

HP StorageWorks Reference Information Storage System User Guide

Product Version: 1.1

First Edition (February 2005)

Part Number: T3559-96007

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Contents

Chapter 1: RISS overview

RISS and RIM 1-2

Understanding document archiving 1-3

Understanding searching and document indexing 1-4
- Indexed document types 1-4
- Message MIME types (advanced users) 1-5

Chapter 2: RISS Web Interface

Logging in and out 2-2

Understanding the user interface 2-3
- Using the toolbar 2-3
- Search basics 2-3

Common tasks 2-5
- Completing simple searches 2-5
- Completing advanced searches 2-6
- Displaying query results 2-9
- Saving query criteria 2-12
- Saving query results 2-13
- Sending query results 2-14
- Exporting query results 2-14
- Accessing saved query criteria 2-17
- Accessing saved query results 2-18
- Changing your password 2-19

Chapter 3: RISS Outlook Interface

Setting up the RISS Outlook Interface 3-2
- Supported Outlook versions 3-2
- Installing the Outlook plug-in 3-2

Understanding the user interface 3-3
- Archived email messages 3-3
- RISS Search Results folder 3-4

Common tasks 3-5
Searching for archived documents 3-5
Accessing exported query results 3-5
Displaying archived email message attachments 3-6

System administrator tasks 3-7
Changing user account settings 3-7

Troubleshooting 3-9
Problems logging in 3-9

Chapter 4: RISS Lotus Notes Interface

Setting up the RISS Lotus Notes Interface 4-2
Supported Lotus Notes versions 4-2
Installing the Lotus Notes plug-in 4-2

Understanding the user interface 4-3

Searching for archived email messages 4-4

Chapter 5: Document Manager

Installing and uninstalling Document Manager 5-2
Requirements 5-2
Installing 5-2
Uninstalling 5-3

Understanding Document Manager 5-4
Concepts 5-4
Queue files for archiving 5-5
Files you can archive 5-5
Archive all email messages in a PST file 5-6
Start or stop automatic archiving 5-7
Examine or remove files queued for archiving 5-7
Search for documents 5-8

Understanding the user interface 5-9
My Active-Archive desktop icon and folder 5-10
My Active-Archive menu in Windows Explorer 5-11
My Active-Archive tray icon 5-11
Help for My Active-Archive 5-12
My Active-Archive Properties dialog box 5-13
Advanced Client Configuration Settings dialog box 5-15

Common tasks 5-17
Starting the Active-Archive Monitor 5-18

Starting and stopping automatic archiving 5-18
Archiving files 5-20
Setting the default archiving behavior 5-22
Displaying queued files 5-22
Examining the archiving status of a file 5-22
Removing a file from the Active-Archive Bin 5-23
Examining properties of a file in the Active-Archive Bin 5-24
Displaying the archiving status and general settings 5-24
Running reports 5-26
Identifying the installed Document Manager version 5-29
Searching for archived documents 5-29

System administrator tasks 5-30
Document Manager clients and server 5-30
Accessing advanced features 5-31
Configuring user settings 5-34
Configuring client-server connections 5-35
Enable or disable user warnings 5-37
Configuring PST import and process settings 5-37
Modifying database entries 5-39
Compressing the database size 5-42

Troubleshooting 5-43
Resuming after quitting improperly 5-43

Chapter 6: Query syntax and matching

Query fields and expressions 6-2

Query expression syntax and matching 6-3
Query expressions are composed of words 6-3
Word characters 6-3
Letters and digits in different character sets 6-4
Matching words 6-6
Matching similar words 6-7
Matching word sequences 6-8
Boolean query expressions 6-9

Query expression examples 6-12

CHAPTER 1

RISS overview

This chapter introduces HP StorageWorks Reference Information Storage System (RISS) and Reference Information Manager (RIM) from a user perspective. It introduces RISS key concepts and provides an overview of RIM.

RISS and RIM

RISS is a fault-tolerant, secure system of hardware and software that archives files and email messages for your organization, and lets you search for archived documents.

- Automatic, active **data archiving** (email and specific types of documents) that helps your organization meet regulatory requirements.
- Interactive **data querying** to search for and retrieve archived data according to various criteria.

RIM is management software supplied with RISS. To interact with the system, you have access to the following applications:

Table 1-1: RIM Applications

Application	What You Can Do
RISS Web Interface	Use your web browser to search for documents archived on the system. Save and reuse your search-query definitions and results. See Chapter 2, *RISS Web Interface*.
RISS Outlook Interface (customer option)	Search for email messages using Microsoft Outlook with a Microsoft Exchange mail server. View and work with archived email messages. See Chapter 3, *RISS Outlook Interface*.
RISS Lotus Notes Interface (customer option)	Search for email messages using IBM Lotus Notes with an IBM Domino mail server. View and work with archived email messages. See Chapter 4, *RISS Lotus Notes Interface*.
Document Manager (customer option)	Manually archive files by placing copies in a special Windows folder. See Chapter 5, *Document Manager*.

The RISS Web Interface is available to all users. The RISS Outlook Interface, RISS Lotus Notes Interface, and Document Manager are independent customer options. Depending on the configuration of your system, each may or may not be available to you.

Understanding document archiving

RISS archives files and email messages associated with registered users. With RIM, you can find and retrieve archived documents to which you have access.

Archiving involves physically storing copies of a **document** (file or email message), but also virtually storing it in one or more repositories. A **repository** is an abstract data store, which is a virtual collection of documents associated with routing rules (for storing) and user access control lists (for retrieving):

- Documents associated with a given user are archived to a given set of repositories. User–repository associations are defined by **routing rules**.
- A user has query and retrieval access to a given set of repositories. This is controlled by **access control lists** associated with each repository.

Most users have query and retrieval access to only their own documents, which are archived in their individual repositories. The system automatically archives, in your individual repository, all email messages associated with your email account; that is, all messages you send or receive.

In addition to being automatically routed to your individual repository, your email is probably also routed to one or more other repositories established by your company or organization. For example, a company audit repository may be used to keep track of all company email. Some users have access to other repositories, besides their own. For example, your manager or supervisor may have access to your repository.

Understanding searching and document indexing

You can search for any documents archived in your repository (or any other repositories to which you have access), whether the documents are email messages or files. When you search for a document, your query is checked against an index of words that is updated each time a document is archived.

You can use the Document Manager customer option to archive files manually. For an archived file, the index always includes at least the external identifying information of the file, such as the file name and last modification date. This is true for all files, regardless of file type.

With Document Manager, you can archive any type of file. However, the system only indexes the contents of email messages and certain types of files. For non-indexed files, only their external identifying information is indexed.

Indexing the contents of a document involves cataloging the document words to prepare them for later searching. Separators (such as punctuation) between words are ignored during indexing. Note that there is a time delay from when files are archived to when they are indexed. Documents archived less than an hour ago may or may not appear in query results depending on the system's configuration.

You can search the contents of a document only if the contents have been indexed. You can search for other kinds of files only by using external identifying information.

Indexed document types

In addition to email messages, the following files are indexed:

- Plain text files
- Rich text files (.rtf)
- HTML (HyperText Markup Language) files
- Files used by the following Microsoft Office programs: Word, Excel, PowerPoint, and Access
- PDF (Portable Document Format) files viewed with Adobe Acrobat Reader

Note: Email message formatting has no bearing on indexing. Only the words you see in your email client are indexing candidates. Invisible source-code words, such as HTML markup tags, are ignored.

Message MIME types (advanced users)

An email message can contain message parts of possibly different MIME (Multipurpose Internet Mail Extensions) Content-Types. The following Content-Types are indexed and each corresponds to one of the indexed document types:

- text/plain
- text/html
- application/rtf
- application/msword
- application/vnd.ms-excel
- application/vnd.ms-powerpoint
- application/msaccess
- application/pdf
- application/ms-tnef

An email message that is entirely plain text, not MIME, is indexed. Also, if an email message has been attached to another email message, the attached email message is not indexed.

CHAPTER 2

RISS Web Interface

This chapter describes the RISS Web Interface to the system. It explains how to search for documents archived in the system, and how to save and reuse query criteria and results.

This chapter contains the following topics:

- Logging in and out, on page 2-2
- Understanding the user interface, on page 2-3
- Common tasks, on page 2-5

See Also

- Chapter 1, *RISS overview*, for fundamental concepts.
- Chapter 6, *Query syntax and matching*, for information on the syntax of queries and how queries are matched against document fields.

Logging in and out

Before logging in for the first time, see your system administrator for the URL to use. Also, use one of the following supported web browsers:

- Microsoft Internet Explorer 5.x and 6.x
- Mozilla 1.x
- Firefox 1.x

To access the RISS Web Interface:

1. In the Address field of your web browser, enter the URL (web address) that was provided to you by your system administrator. The web browser displays a login screen.
2. Enter your user name and password. Both fields are case-sensitive. Click Login. The Simple Search page is displayed.
3. To log out, click LogOut in the toolbar.

Note: If your system administrator provided you with a temporary password, change your password immediately after logging in for the first time – see *Changing your password*, on page 2-19.

Understanding the user interface

Using the toolbar

Each page of the RISS Web Interface has a toolbar at the top.



Figure 2-1: RISS Web Interface toolbar

The toolbar has the following buttons:

Table 2-1: Toolbar Buttons, RISS Web Interface

Button	Description
New Search	Click to display the Simple Search page, where you can submit a query. See *Completing simple searches*, on page 2-5.
Query Manager	Click to display the Query Manager page, where you can display saved queries (see *Accessing saved query criteria*, on page 2-17) and results (see *Accessing saved query results*, on page 2-18).
Preferences	Click to display the Preferences page, where certain users can change their password for accessing the RISS Web Interface. See *Changing your password*, on page 2-19.
Help	Click for online help about the RISS Web Interface.
LogOut	Click to log out of the RISS Web Interface.

Search basics

Using the Search For field

The Search for field is available when using the Simple Search and Advanced Search pages. Use this field to search for specific words in a document (email messages or files).

The query syntax allowed is described in Chapter 6, *Query syntax and matching*. You can enter simple words, words with wildcards, or a more sophisticated query involving Boolean expressions or word sequences.

Usage Note: To narrow the search to the documents you want to find, make your Search for text as specific as possible. In general, the more information provided in the Search for field, the narrower the search. If the field is blank (empty), you will find all documents corresponding to the other fields.

Searching indexed contents

The Search for field is checked for a match against the indexed contents of documents.

- For email messages, the Search for field for words in the message body, but **not** in other message fields such as Subject, From, or To. In addition, the Search for field applies to message attachments that are indexed document files.
- For files, Search for applies only to indexed document files. Other types of files do not have indexed contents so their contents cannot be searched.

See Also

- *Understanding searching and document indexing*, on page 1-4, for more information about indexed files
- Chapter 6, *Query syntax and matching*

Common tasks

Use the following table as a quick reference for performing common tasks.

Table 2-2: RISS Web Interface Tasks

Task	Reference
Search for archived documents	*Completing simple searches*, on page 2-5 and *Completing advanced searches*, on page 2-6
Display the query results	*Displaying query results*, on page 2-9
Save query criteria	*Saving query criteria*, on page 2-12
Save the results of a search	*Saving query results*, on page 2-13
Send the query results to your email account	*Sending query results*, on page 2-14
Export the query results to your Outlook account	*Exporting query results*, on page 2-14
Display saved query criteria	*Accessing saved query criteria*, on page 2-17
Display the saved results of a search	*Accessing saved query results*, on page 2-18
Change your password	*Changing your password*, on page 2-19

Completing simple searches

The Simple Search page searches for documents (email messages or files) containing words you enter in the Search for field. In the Search for field, you can enter simple words, words with wildcards, or a more sophisticated query involving Boolean expressions or word sequences. The Simple Search page is simpler than the Advanced Search page only because there are fewer fields you can search on.

To complete a simple search:

1. Click New Search in the toolbar. The Simple Search page is displayed.

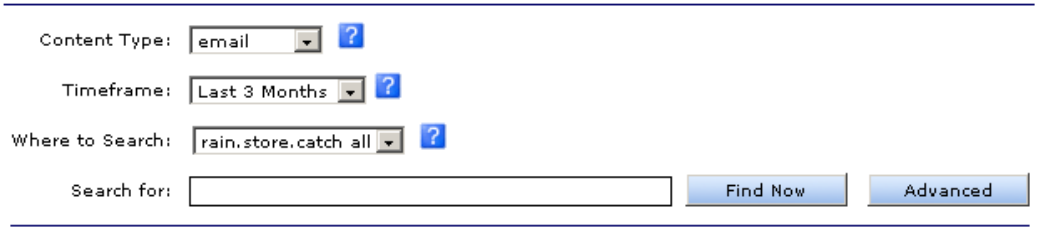


Figure 2-2: Simple Search page

2. To complete an advanced search, click Advanced. See *Completing advanced searches*, on page 2-6.
3. Search using all of the following fields on the Simple Search page:
   - Content Type: Whether to search for files (document) or email messages (email).
   - Timeframe: The time period to search. This includes the last-modified date of a file or the date an email message was sent.
   - Where to Search: The repository to search. A repository is a virtual collection of documents (email messages and files). Only the repositories to which you have access are displayed. At a minimum, you have access to your own repository.
   - Search for: Searches for words in the document or message body, but not in message fields such as Subject, From, or To.
4. When you have finished defining your query, click Find Now to start the search. The Query Results page is displayed.

See Also

- *Search basics*, on page 2-3*Displaying query results*, on page 2-9

Completing advanced searches

For more specific searches, use the Advanced Search page. In addition to the fields of the Simple Search page, the Advanced Search page provides additional query fields to help you refine your search.

To complete an advanced search:

1. Click New Search in the toolbar, and then click Advanced. The Advanced Search page is displayed.

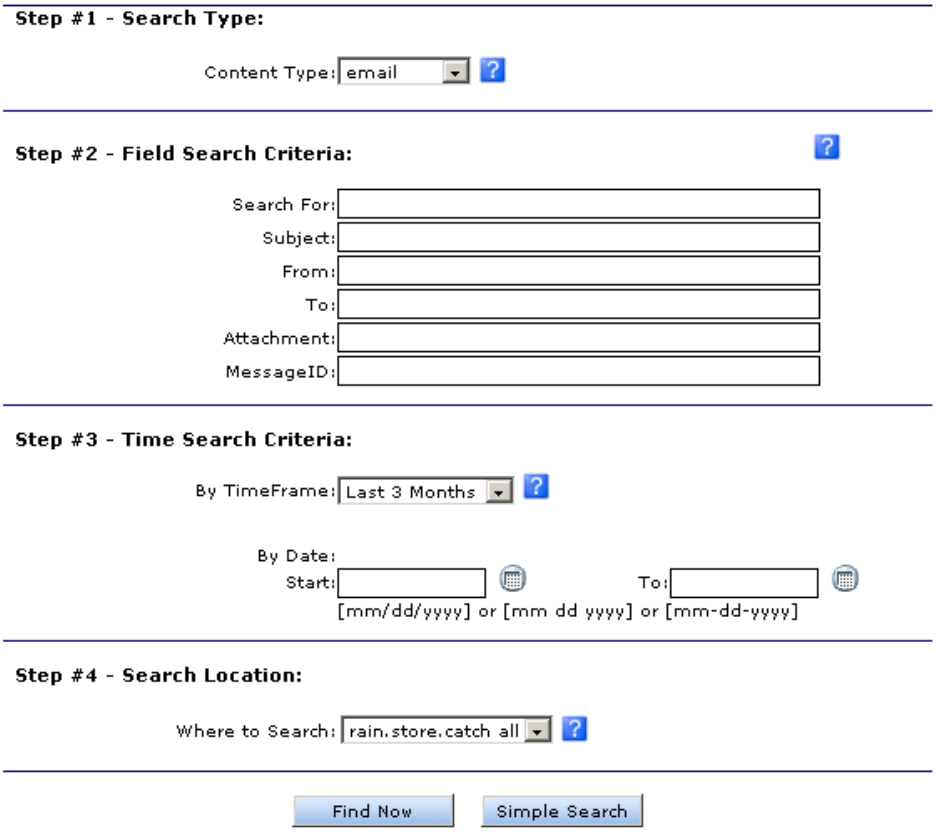


Figure 2-3: Advanced Search page (email content type)

2. Search using the following fields on the Advanced Search page:
   - Content Type: Whether to search for files (document) or email messages (email).
   - Search For: Searches for words in the document or message body, but not in message fields such as Subject, From, or To.
   - By TimeFrame: The time period to search. This includes the last-modified date of a file or the date an email message was sent.

As an alternative to the By TimeFrame field, you can define a time period to search by specifying the Start and end (To) dates. For example, to search for documents dated between March 8, 2003 and March 23, 2003, enter 03/08/2003 in the Start field and 03/23/2003 in the To field.

– Where to Search: The repository to search. A repository is a virtual collection of documents (email messages and files). Only the repositories to which you have access are displayed. At a minimum, you have access to your own repository.

3. If you want a more refined search, also use the additional query fields (as shown in the following table). The available fields depend on the Content Type you select.

Table 2-3: Additional Advanced Search Query Fields

Query Field	Matches (in the Document)
Email Content Type Only	
Subject	The Subject message field.
From	The From message field.
To	All message recipients. This includes the To, Cc, Bcc, and Apparently-To message fields.
Attachment	The file name of a message attachment. (The contents of indexed document attachments are searched using the Search for field.)
MessageID	The MessageID message field from Outlook, a message identification number (not all messages have MessageIDs). Use this field mainly for audit searches. To display the MessageID field in Outlook: 1.Double-click to open the message in its own window. 2.Choose the View > Options menu item. The Message Options dialog box is displayed. 3.If the message has a MessageID, the field is shown in the Internet headers field of the Message Options dialog box. Example: Message-ID: <LISTMANAGER-115380-9228-2003.03.04-17.34.24--user#hp.com@lists.FrameUsers.com>.
Document (File) Content Type Only	
Document Name	File name, not including the file extension.

Table 2-3: Additional Advanced Search Query Fields (Continued)

Query Field	Matches (in the Document)
Document Path	File path. *Usage Note:* As for any other text query field, separators such as slash (/), backslash (\ ), and colon (:) are ignored, and the query words are searched in any order. For example, query text c:\abc\xyz will match path abc:\xyz\c, as well as path c:\abc\xyz. To ensure that path components are searched in order, enclose the field text in double-quotes (") to use a word-sequence query. See Chapter 6, *Query syntax and matching*, for a complete definition of the Search Engine query syntax.
Extension	File extension. Example: doc for a Microsoft Word file.
Title	Title of the document. Only some files have associated titles. For example, to see the title of a Word document, choose File > Properties (in Word). The Title field is shown on the Summary panel of the displayed Properties dialog box.
Author	Author of the document. Only some files have associated authors. For example, to see the author of a Word document, choose File > Properties (in Word). The Author field is shown on the Summary panel of the displayed Properties dialog box.

4. When you have finished defining your query, click Find Now to start the search. The Query Results page is displayed.

See Also

- *Completing simple searches*, on page 2-5
- Chapter 6, *Query syntax and matching*

Displaying query results

The Query Results page is displayed as soon as you submit a query. From the Query Results page, you can also save, send, or export searches and results by clicking More Options.

To display the results of a query:

1. Complete a simple search, advanced search, or display the results of a previous search. The Query Results page is displayed.

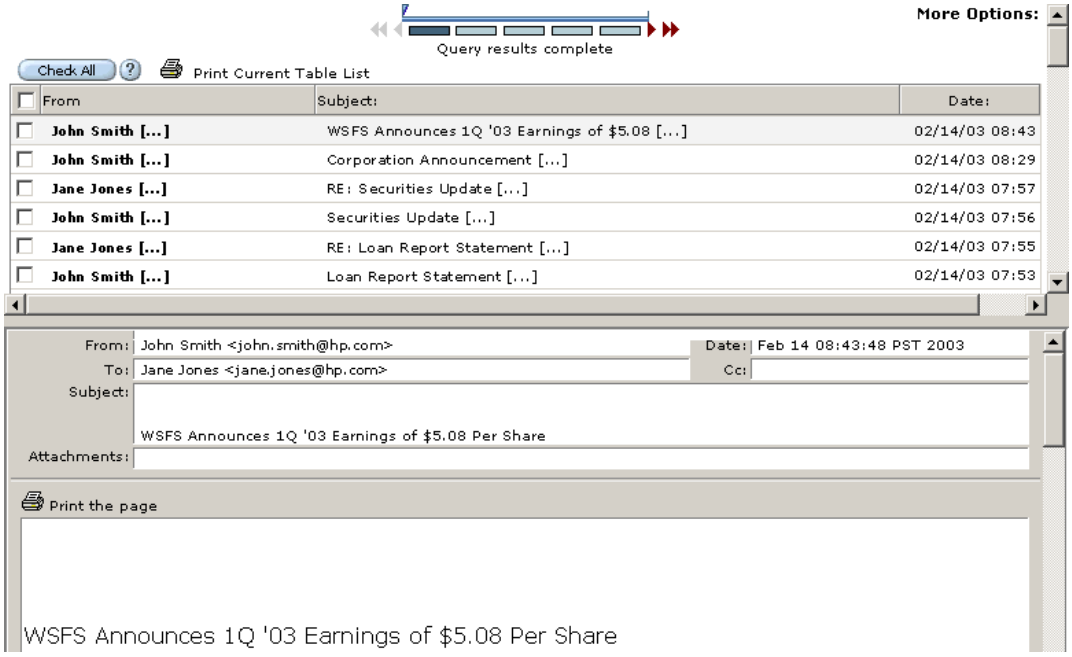


Figure 2-4: Query Results page (email content type)

2. From the Query Results page, complete any of the following tasks:
   - To display a different group of 50 results, click the different symbols in the query results navigation bar. See *Query results navigation bar*, on page 2-11 for more information.
   - To select all displayed documents or clear all selected documents, click Check All or Uncheck All, respectively.
   - To print the Query Results page, click Print Current Table List.
   - To save the current query criteria, see *Saving query criteria*, on page 2-12.
   - To save the current query results, see *Saving query results*, on page 2-13.
   - To mail all or selected query results to your mailbox, see *Sending query results*, on page 2-14.
   - To export all or selected query results, see *Exporting query results*, on page 2-14.

Query results navigation bar

When the query results are retrieved, the most recent documents are displayed first.

Note: Documents archived less than an hour ago may or may not appear in query results depending on the system's configuration.

Fifty results (maximum) are shown on the Query Results page. You can use the query results navigation bar to display different groups of 50 results.

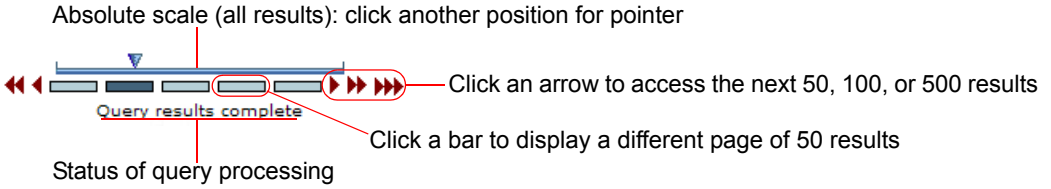


Figure 2-5: Query results navigation bar

The query results navigation bar shows the following information:

Table 2-4: Query Results Navigation Bar

Item	Description
bars:	From left to right, the five bars represent subsequent pages of 50 results (maximum). Click a bar to display its page of results. The dark bar represents the currently displayed results. *Note:* To see just which documents a given bar represents, hold the mouse pointer over it momentarily to display a tooltip.
arrows: • ▸ ▸▸ ▸▸▸ • ◂◂◂ ◂◂ ◂	Click an arrow to display a different page of results: • Move the results display forward by 50 (▸), 100 (▸▸), or 500 (▸▸▸) documents. • Move the results display back by 50 (◂), 100 (◂◂), or 500 (◂◂◂). For example, if the current page shows results 1-50, clicking the right double-arrow (▸▸) displays results 100-150. *Note:* For background query results, triple arrows (◂◂◂, ▸▸▸) represent 1000 results (instead of 500), and quadruple arrows (◂◂◂◂, ▸▸▸▸) represent 10,000 results.

Table 2-4: Query Results Navigation Bar (Continued)

Item	Description
absolute scale: 	The horizontal bar represents all query results, whether 300 or 3,000,000. The pointer indicates which set of 100 results (maximum) is accessible using the navigation bars (▭). You can move the scale pointer to a position you click along the horizontal scale.
status	Text indicating the current status of results retrieval: • Query Still In Progress – Searching is in progress. Less than 50 results have been found so far. • Click Above – Searching is in progress. At least 50 results out of a possible maximum of 500 results have been found and displayed. You can click a navigation bar (▭) to display a set of 50 results while the search is in progress. • Query Results Complete – Searching is complete if the query produces no more than 500 query results. If there are more than 500 results, the search for the first 500 results is complete. To search for additional results with the same query, click the right triple-arrow symbol (⏭). For background query results, Query Results Complete means all results have been retrieved.

Query results are retrieved in batches of 500 (maximum)

When you submit a query, only the first 500 results (maximum) are retrieved. To see more results, you must click the right triple-arrow symbol (⏭). Each batch of 500 results (maximum) corresponds to a separate query process submitted to the RISS Web Interface. For this reason, the status message Query Results Complete means that a complete batch of 500 results (maximum) has been retrieved and the query is done searching for the first 500 results. It does not mean that all query results have been retrieved.

Saving query criteria

After you submit a search, you can save the query criteria from the Query Results page.

To save query criteria:

1. Submit a search (see *Completing simple searches*, on page 2-5).

2. From the Query Results page, click More Options, and then click Save Current Search Criteria. Or, right-click and click Save criteria.
3. Enter the name of the query criteria you are saving in the Save Query Criteria as field. To erase text entered in the Save Query Criteria as field, click Clear.
4. Click Save Now.
5. To access the saved search, see *Accessing saved query criteria*, on page 2-17.

Saving query results

After you submit a search, you can save the query results from the Query Results page.

If the query locates a large number of documents, saving the query results is useful. A typical example is an audit query. You can save the results while the query is still processing and then retrieve all the results at a later time.

When you save query results of a large search, the query is resubmitted as a background process that retrieves all results, no matter how many. Because the query runs in the background, you can continue to use the RISS Web Interface (for example, by submitting other queries).

To save query results:

1. Submit a search (see *Completing simple searches*, on page 2-5).
2. From the Query Results page, click More Options, and then click Save Current Results. Or, right-click and click Save results.
3. Enter the name of the query results you are saving in the Save Search Results as field. To erase text entered in the Save Search Results as field, click Clear.
4. Click Save Now.
5. To access the saved results, see *Accessing saved query results*, on page 2-18.

Note: The results are not retrieved in order of age. They are sorted by age after they have all been retrieved (query processing is Finished). If you access the saved results before the query is Finished, the results are not sorted.

Sending query results

After you submit a search, you can send to your email account the results of the query from the Query Results page. You can also send results of saved query results from the Query Manager page.

To send query results of the current search:

1. Submit a search (see *Completing simple searches*, on page 2-5).
2. If you are sending specific items from the query results, select the check box next to each item you want to send. Skip this step if you are sending all items.
3. To send the entire query results, click Send All Items from the More Options menu. To send the selected items, click Send Checked Items from the More Options menu. A confirmation message is displayed when the items are sent.

To send all the query results of a saved search:

1. Click Query Manager in the toolbar to access a the saved query results (see *Accessing saved query results*, on page 2-18).
2. Click Mail All To Me next to the saved search item. A confirmation message is displayed when all the items are sent.

Exporting query results

If you have installed the Outlook plug-in and are using the RISS Outlook Interface customer option, you can use the Export Checked Items and Export All Items options in the More Options menu to export query results. You can export query results directly to Outlook or create a PST file to save to an external location, such as your hard drive.

To export your query results:

1. Submit a query or access previously saved query results.
2. From the Query Results page, select the check box next to each item you want to export. Skip this step if you are exporting all items.
3. Click More Options to open the menu.
4. To export the entire query results, click Export All Items. To export the selected items, click Export Checked Items. If this is the first time you have exported query results, the File Download dialog box is displayed.

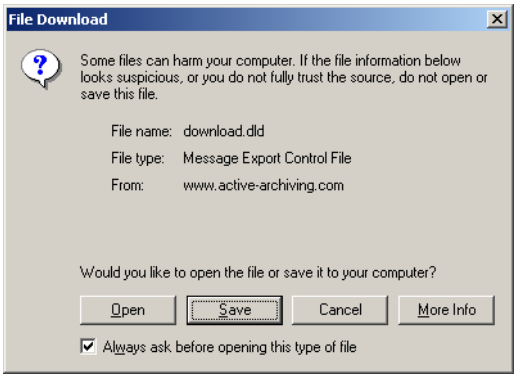


Figure 2-6: File Download dialog box

5. Select the Always ask before opening this type of file check box to clear it. If you clear the check box, you will no longer have to complete this step in the future.
6. Click Open to start the export process. The Export Progress dialog box is displayed.

   If you click Save and save the file, double-click the file in Windows Explorer to open it and continue with this procedure.

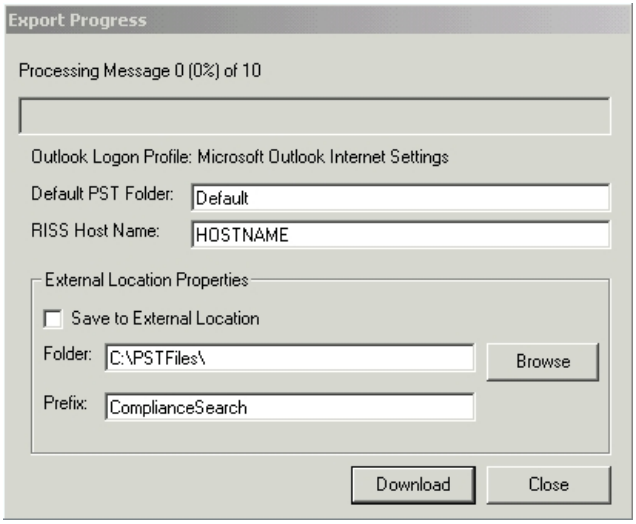


Figure 2-7: Export Progress dialog box

7. If you are exporting the query results directly to Outlook, in the Default PST Folder field, enter the name of the Outlook folder where you want to save the result. The default folder name is Default. Any messages you previously exported to the Default folder are deleted unless you create a new folder. Non-existent PST folders are created automatically.

8. In the RISS Host Name field, enter the host name or IP address used to access the RISS Web Interface.

9. If you are exporting the query results to an external location, complete all of the following:

   – Select the Save to External Location check box.

   – Specify where you want to save the query results by entering a path in the Folder field or clicking Browse to select a location.

   – In the Prefix field, enter the name of the PST file that will be generated when you export the query results.

     If the file size exceeds 1.7 GB, the PST file is automatically divided into more than one file and numbered sequentially (for example, `XYZ_001.pst`, `XYZ_002.pst`, and so forth).

     Outlook 2000: If your query results contain more than 16,000 messages, a new PST file will be created even if the 1.7 GB size

limitation has not been reached yet. Outlook 2002 or 2003: The maximum number of messages is 64,000.

10. To begin the export process, click Download. Clicking Close will quit the export process.

11. A progress bar is displayed while you are downloading the query results. When the export process is complete, click Close. If an error occurs, an error message is displayed. Click OK to display the error log.

    You can work with these messages as you would any email message. For instance, you can reply to, forward, or delete a message. Deleting a message removes it from your Outlook account, but does not delete it from the system.

See Also

- *Accessing exported query results*, on page 3-5

Accessing saved query criteria

If you save the criteria of a query, you can access it from the Query Manager page. Each item listed shows the name of the saved query criteria and date of when you saved the query criteria.

To access a saved query criteria:

1. Click Query Manager in the toolbar. All previously saved searches are listed in the Query Criteria area.

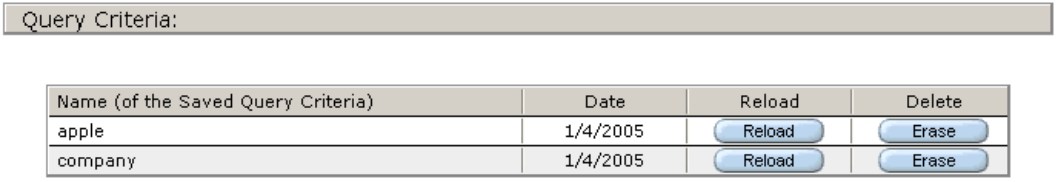


Figure 2-8: Query Criteria area, Query Manager page

2. Complete any of the following tasks:

   – To resubmit the query, click Reload. The Advanced Search page with the saved query criteria already entered is displayed. You can then resubmit the query by clicking Search.

– To delete the saved query criteria, click Erase. You are not prompted to confirm the deletion.

Accessing saved query results

If you save the results of a query, you can access it from the Query Manager page. Each item listed shows the name of the query results, status of the query, and start and end dates of the query criteria.

To access the results of a saved query:

1. Click Query Manager in the toolbar. All saved query results are listed in the Query Results area.

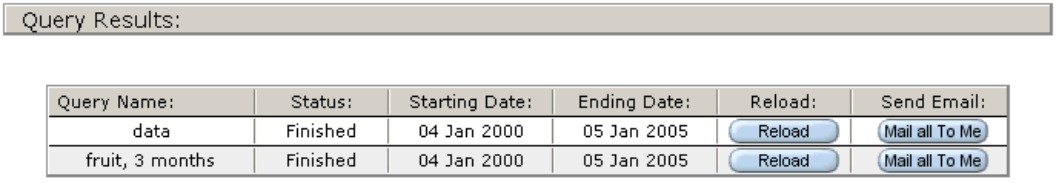


Figure 2-9: Query Results area, Query Manager page

2. To determine the current status of a query, check the Status column for one of the following statuses:
   – Unfinished: Not all results have been retrieved yet. If you display the retrieved results, they will not be sorted by age.
   – Finished: All results have been retrieved. Displayed results are sorted by age.
   – Finished Interrupted: The query process was interrupted. All of the displayed results correctly match your query, but the list of results may not be complete. Resubmit your query for a complete list.
3. Complete any of the following tasks:
   – To display the query results, click Reload. The Query Results page is displayed.
   – To send all the results of a saved query, click Mail All To Me. You are not prompted to confirm this action. Be aware that you may be sending yourself a significant number of email messages.

Note: You cannot delete saved query results.

Changing your password

Depending on how your system is configured, your password is the same as your Windows password or you have the option to manage your password. This section applies to users who can change their password through the Web Interface.

For security reasons, change your password periodically. Change your password immediately after you log in for the first time.

To change your password for accessing the RISS Web Interface:

1. Click Preferences in the toolbar.
2. Enter your current password (Old Password), enter the New Password twice, and then click Change.

CHAPTER 3

RISS Outlook Interface

This chapter describes the RISS Outlook Interface to the system. It explains how to view and work with archived email messages in Microsoft Outlook, and how to search from within Outlook for email messages archived in the system.

This chapter contains the following topics:

- Setting up the RISS Outlook Interface, on page 3-2
- Understanding the user interface, on page 3-3
- Common tasks, on page 3-5
- System administrator tasks, on page 3-7
- Troubleshooting, on page 3-9

See Also

- Chapter 1, *RISS overview*, for fundamental concepts.
- Chapter 2, *RISS Web Interface*, for information on how to search your repository for archived documents.
- Chapter 6, *Query syntax and matching*, for information on the syntax of queries and how queries are matched against email message fields.

Setting up the RISS Outlook Interface

Before you can use the RISS Outlook Interface, your system administrator must first install the Outlook plug-in, and then you must initialize your Outlook account.

Supported Outlook versions

Use one of the following supported versions of Outlook when using the RISS Outlook Interface:

- Outlook 2000
- Outlook 2002 (Outlook XP) with Service Pack 1
- Outlook 2003 with Service Pack 1

Installing the Outlook plug-in

Contact your system administrator or refer to the *RISS Administrator Guide* for more information about installing the Outlook plug-in.

Understanding the user interface

You can use Outlook to display and work with archived messages. You can also use the search tools to locate archived email messages.

The following table describes the user interface objects available in Outlook after installing the Outlook plug-in and initializing your Outlook account.

Table 3-1: RISS Outlook User Interface Objects

Objects	Description
Stub (or Tombstone) icon: 	Represents an archived email message. See *Archived email messages*, on page 3-3.
RISS Search Results folder	Contains the query results you have exported from the RISS Web Interface if you exported directly to Outlook. See *RISS Search Results folder*, on page 3-4. For more information about exporting query results, see Chapter 2, *RISS Web Interface*, *Exporting query results*, on page 2-14.
Search Archive button	To search for archived messages, click Search Archive, which opens the RISS Web Interface. Use the RISS Web Interface to search for messages. For more information about the RISS Web Interface, see Chapter 2, *RISS Web Interface*.
Archive Options dialog box	An advanced feature used by system administrators to configure your Outlook account. See *Changing user account settings*, on page 3-7.

Archived email messages

Email messages in your Outlook mailbox that have been archived are represented with a special icon known as a Stub (or Tombstone) icon ().

Your system administrator can archive email messages based on certain rules to reduce the size of your mailbox. You can work with archived email messages as you would any email message. For instance, you can reply to, forward, or delete an archived email message. Deleting an archived email message deletes the message from your mailbox, but not from RISS.

To display a message, double-click it to open the email in its own window. You can also view the message from the Outlook preview pane.

To display a message attachment, double-click the message and then open the attachment. You cannot view message attachments through the Outlook preview pane.

RISS Search Results folder

The RISS Search Results folder contains the query results you have exported from the RISS Web Interface if you chose the option to export directly to Outlook.

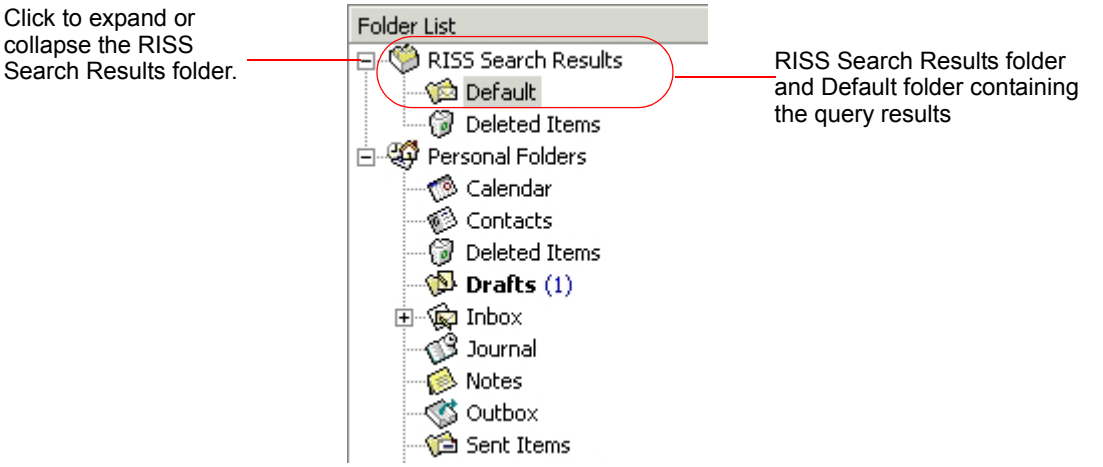


Figure 3-1: RISS Search Results folder in Outlook window

Common tasks

Use the following table as a quick reference for performing common tasks.

Table 3-2: RISS Outlook Interface Tasks

Task	Reference
Search for archived documents	*Searching for archived documents*, on page 3-5
Display the query results you exported from the RISS Web Interface	*Accessing exported query results*, on page 3-5
Display attachments	*Displaying archived email message attachments*, on page 3-6

Searching for archived documents

You can use the RISS Outlook Interface to access the RISS Web Interface, where you can search for documents (email messages or files) in your repository.

To search for an archived document, choose one of the following methods:

- Click Search Archive. If this button is not displayed in the Outlook toolbar, choose Toolbars > HP RISS in the View menu to display it.

Accessing exported query results

If you have exported query results from the RISS Web Interface to Outlook, the results are saved in a subfolder within the RISS Search Results folder.

To access the results that you exported directly to Outlook:

- Open the RISS Search Results folder and select the subfolder containing the exported query results. The results are displayed in the Outlook window.

To access the results that you exported to an external location:

1. Choose File > Open > Outlook Data File or Personal Folder File.

2. Navigate to the location where the exported file is located.
3. Select the file and click OK.

Displaying archived email message attachments

Attachments to email messages can be quite large. For performance reasons, whenever an archived message matching a query is retrieved, all attachments are replaced with a single attachment, called Attachments.html, which serves as a proxy for the original attachments. The original message is unaffected. The message copy in the query results folder has Attachments.html attached.

The **attachments proxy** is a link to a web page, Attachments Access Page, where you can open or save any of the original message attachments.

To open or save a message attachment:

1. Display the email message that has the attachment:
   - To display the email in its own window, double-click it.
   - To display the email in the Outlook preview pane, select it. If the Outlook preview pane is not visible, choose Preview Pane in the View menu to display it.
2. Double-click the attachment Attachments.html in the displayed message. The Opening Mail Attachment dialog box is displayed.
3. In the Opening Mail Attachment dialog box, select Open it. The Attachments Access Page is displayed in your web browser.
4. In the Attachments list on the Attachments Access Page, select the name of a message attachment, and then click Download. The File Download dialog box is displayed.
5. In the File Download dialog box, click Open to open the selected attachment or Save to save it to disk. (If you save the attachment you must specify where to save it in the Save As dialog box.)
6. Repeat steps 4–5 to open or save other attachments.
7. On the Attachments Access Page web page, click Close. When the confirmation dialog box prompts you to close the web browser window, click Yes.

System administrator tasks

Changing user account settings

Only system administrators should use the advanced features to configure an Outlook account for the needs of a specific user.

To change user account settings:

1. Choose Options in the Tool menu, and then click the Archive Options tab. The Archive Options panel of the Options dialog box is displayed.

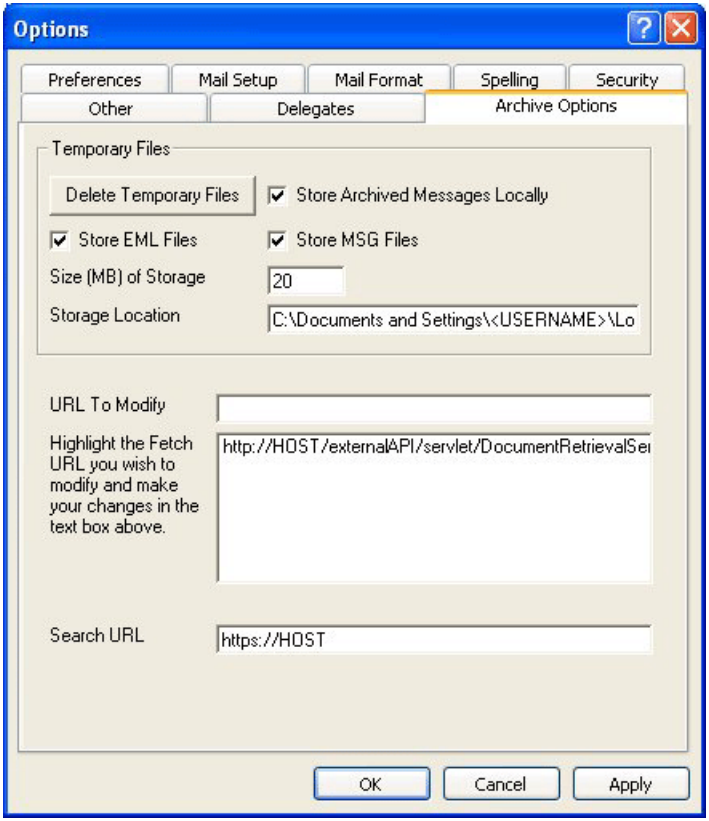


Figure 3-2: Archive Options panel, Options dialog box

Use the Archive Options panel to change the settings and options described in the following table:

Table 3-3: **Archive Options** Panel, Options Dialog Box

Item	Description
Delete Temporary Files	Click to delete local storage files.
Store Archived Messages Locally	If enabled, files are stored locally in the user's cache and are available for quick access. By default, this option is enabled. If disabled, files are not stored in the user's cache and take longer to retrieve. This option provides more storage space on the user's computer if space is limited.
Store EML Files	If enabled, EML files are stored in cache. EML files are compressed files that can be retrieved more quickly than MSG files. By default, this option is enabled. This option is applicable only if the Store Archived Messages Locally check box is selected.
Store MSG files	If enabled, MSG files are stored in cache. MSG files are more structured than EML files. By default, this option is enabled. This option is applicable only if the Store Archived Messages Locally check box is selected.
Size (MB) of Storage	The amount of disk space reserved on your computer to store the files. The default is 20 MB. This option is applicable only if the Store Archived Messages Locally check box is selected.
Storage Location	The archived message cache location. Replace <USERNAME> with the user's Windows login name. This option is applicable only if the Store Archived Messages Locally check box is selected.
URL to Modify (Fetch URL)	The RISS URL used to retrieve archived messages. Replace HOST with the DNS name associated with the virtual IP web user interface for the system.
Search URL	The internet address of RISS. Replace HOST with the DNS name associated with the virtual IP web user interface for the system.

Troubleshooting

Problems logging in

If you change your Windows password or mail servers, the RISS Outlook Interface prompts you to log in when you try to search your repository. Providing your current (new) password and mail server updates your account information (password and mail server).

Note: The rest of this section provides background information, to help you understand why this new login information is needed.

To use the RISS Outlook Interface you must be logged in to both:

- A Microsoft Exchange mail server
- RISS

After you initialize your Outlook account, these login operations are performed automatically. You are not prompted for your user name, password, and mail server.

- When you open Outlook, you are automatically logged in to Exchange.
- When you submit a search query, you are automatically logged in to the system.

Your Windows password is used for logging in to Exchange. When you initialize your Outlook account, your Windows password becomes your RISS password as well.

To resynchronize your RISS login information with your new Exchange login information, the RISS Outlook Interface prompts you to provide the new information.

CHAPTER 4

RISS Lotus Notes Interface

This chapter describes the RISS Lotus Notes Interface to the system. It explains how to view and work with archived email messages in IBM Lotus Notes, and how to search for email messages archived in the system.

This chapter contains the following topics:

- Setting up the RISS Lotus Notes Interface, on page 4-2
- Understanding the user interface, on page 4-3
- Searching for archived email messages, on page 4-4

See Also

- Chapter 1, *RISS overview*, for fundamental concepts.
- Chapter 2, *RISS Web Interface*, for information on how to search your repository for archived documents.
- Chapter 6, *Query syntax and matching*, for information on the syntax of queries and how queries are matched against email message fields.

Setting up the RISS Lotus Notes Interface

Before you can use the RISS Lotus Notes Interface, your system administrator must first install the Lotus Notes plug-in.

Supported Lotus Notes versions

Use one of the following supported versions of Lotus Notes when using the RISS Lotus Notes Interface:

- Lotus Notes 5.x
- Lotus Notes 6.x

Installing the Lotus Notes plug-in

Contact your system administrator or refer to the *RISS Administrator Guide* for more information about installing the Lotus Notes plug-in.

Understanding the user interface

You can use Lotus Notes to display and work with archived messages.

Your system administrator can archive email messages based on certain rules to reduce the size of your mailbox. You can work with archived email messages as you would any email message. For instance, you can reply to, forward, or delete an archived email message. Deleting an archived email message deletes the message from your mailbox, but not from the system.

You can also use the search tools to locate archived documents (email messages or files). For more information about setting up the search features, see Searching for archived email messages, on page 4-4.

Searching for archived email messages

To search for archived documents, use the RISS Web Interface. You can create a link in the Lotus Notes navigation pane that takes you directly to the RISS Web Interface when clicked. For more information about using the RISS Web Interface, see Chapter 2, *RISS Web Interface*.

To set up a link that directs you to the RISS Web Interface:

1. Open Lotus Domino Designer.
2. On the Design pane, click Resources (Lotus Notes 5.x) or Shared Resources (Lotus Notes 6.x), and then click Images.
3. Click New Image Resource.
4. In the Open dialog box, select a graphic to use as an icon on the link. Click Open.
5. On the Design pane, click Outlines (Lotus Notes 5.x), or click Shared Code and then Outlines (Lotus Notes 6.x).
6. Open NotesMailOutline.
7. Click New Entry.
8. In the Label field, enter a name for the link.
9. From the Type list, choose URL.
10. In the Value field, enter the URL or IP address of your RISS Web Interface.
11. Click the Folder button in the Image area. The Insert Image Resource dialog box is displayed.
12. Select the image you selected earlier and click OK.
13. Press Esc to exit out of Domino Designer and click Yes when prompted to save changes.
14. When you access Lotus Notes, a link to the RISS Web Interface is displayed in the navigation pane. Click the link to display the RISS Web Interface.

CHAPTER 5

Document Manager

This chapter explains how to use Document Manager to archive documents in your repository. For system administrators, it explains how to configure the Document Manager client.

This chapter contains the following topics:

- Installing and uninstalling Document Manager, on page 5-2
- Understanding Document Manager, on page 5-4
- Understanding the user interface, on page 5-9
- Common tasks, on page 5-17
- System administrator tasks, on page 5-30
- Troubleshooting, on page 5-43

See Also

- Chapter 1, *RISS overview*, for fundamental concepts.
- Chapter 2, *RISS Web Interface*, for information on how to search your repository for archived documents.
- Chapter 6, *Query syntax and matching*, for a detailed description of the search query syntax.

Installing and uninstalling Document Manager

Requirements

Document Manager runs on the following versions of Microsoft Windows:

- Windows 2000
- Windows XP

Use one of the following versions of Outlook:

- Outlook 2000
- Outlook 2002 (Outlook XP) with Service Pack 1
- Outlook 2003 with Service Pack 1

Installing

Install Document Manager on your desktop computer using either the installation CD–ROM or installation program located on your network. You must have local administrative privileges to install and use Document Manager. Also, before installing Document Manager, make sure Outlook has been properly shut down. See your system administrator for more information.

An installation wizard guides you through the installation steps and prompts you to choose the destination folder. The default value is `C:\Program Files\Hewlett-Packard\HP RISS Document Manager`.

You must also provide your email address and connection settings. By default, the Use the currently logged on user for establishing connection settings check box is selected. Leave this selected, unless you plan to archive documents to a network domain that is different from the one you use when logging on to Windows.

If you use a different domain, supply your Windows Logon User Name, Windows Logon Domain, and Host Address (the address of the RISS SMTP server). Ask your system administrator for this information.

Uninstalling

If necessary, you can uninstall Document Manager using the Add or Remove Programs feature in the Windows Control Panel. Choose HP RISS Document Manager in the list of installed programs, click Change/Remove, and then follow the displayed instructions to confirm removal. If you are unfamiliar with uninstalling programs, ask your system administrator for assistance.

Understanding Document Manager

Document Manager is a desktop tool used to archive documents in your repository and to search for archived documents. Document Manager includes features for everyday use by everyone, as well as advanced configuration features for system administrators only.

See Also

- *Understanding the user interface*, on page 5-9, for a detailed description of the user interface.
- *Common tasks*, on page 5-17, for information on how to perform common Document Manager tasks.
- *System administrator tasks*, on page 5-30, for information on advanced features for system administrators.
- *Troubleshooting*, on page 5-43, for information on solving a problem.

Concepts

The system automatically archives all email messages you send or receive in your individual repository. In addition to automatic archiving, you can use **Document Manager** to manually archive any files you want and place them in your repository along with your messages. You can also use Document Manager to archive email messages contained in Outlook PST files.

When you search for a document, your query is checked against an index of words, which is updated each time a document is archived. For a file, the index always includes the external identifying information of the file, such as the file name and last modification date.

Although you can use Document Manager to archive any type of file, the system only indexes the contents of Outlook email messages and indexed documents.

If Document Manager does not recognize a file you queue for archiving as a document that can be indexed, Document Manager displays a warning message that the file contents might not be indexed.

See Also

- Chapter 1, *RISS overview*, for more information on the concepts of archiving and indexing, including fundamental definitions.
- Chapter 6, *Query syntax and matching*, for details on which document contents are indexed.

Queue files for archiving

You interact with Document Manager mainly through the Active-Archive Bin located on your Windows desktop. The Active-Archive Bin is a desktop icon and folder that functions much like your Windows Recycle Bin. Dragging files to your Recycle Bin queues them for deletion whereas dragging files to your Active-Archive Bin queues them for archiving.

You can examine the contents of your Active-Archive Bin at any time. The files you see there are those you queued for archiving.

Note: Archiving saves a copy of a file. The original file is not affected. However, do not delete a file you have queued for archiving, until you are sure that it has been successfully archived.

See Also

- *Archiving files*, on page 5-20

Files you can archive

You can queue files for archiving if they have all of the following properties:

- The file is of an appropriate type, as defined by your particular system's configuration.
- The file is old enough, as defined by your particular system's configuration. The last-modified date is used to measure file age.
- The same file is not already in the archive queue, and it has not been archived previously. For two files to be considered the same, they must:
  - Have the same filename

- Be in the same location
- Have the same last-modified date

A copy of a file with a different name, with the same name in a different folder, or with a different date is not considered the same file.

If you try to queue a file for archiving that does not meet these properties, a warning message is displayed.

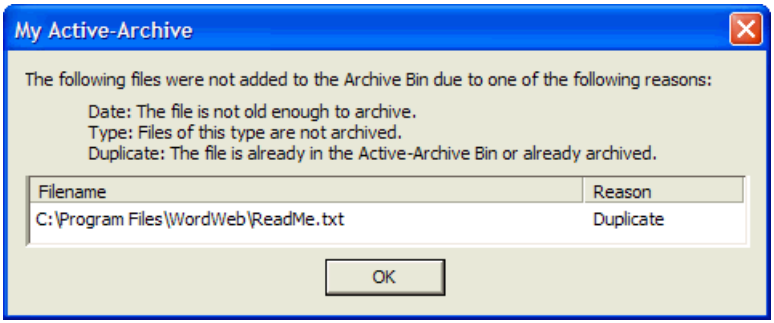


Figure 5-1: Warning dialog box: file is too young, of bad type, or already queued

See Also

- *Displaying queued files*, on page 5-22
- *Examining the archiving status of a file*, on page 5-22

Archive all email messages in a PST file

A **PST file** is an Outlook Personal Folder file and has the extension `.pst`. A PST file can contain multiple Outlook documents of several types, including Outlook tasks, Outlook contacts, and email messages. Using Outlook, you can create a PST file by exporting an Outlook folder, such as the Inbox. Refer to the Outlook documentation for information on exporting a folder to a PST file.

Depending on how the system and Document Manager are configured, PST files are archived differently than other files. Instead of archiving the PST file itself, the individual Outlook email messages contained in the file are each archived separately. You can then search your repository for, and retrieve, any of these messages individually.

Only the email messages in a PST file are archived. All other documents in the file (such as Outlook contacts and Outlook tasks) are ignored by Document Manager.

Note: Do not archive a PST file that you have archived previously. Otherwise, duplicate messages will be created in the archive.

See Also

- *Archiving files*, on page 5-20

Start or stop automatic archiving

Just as the Windows Recycle Bin acts as a staging area for files that will be deleted, the Active-Archive Bin acts as a staging area for files that will be archived. You can start and stop the automatic archiving of queued files.

After you start (enable) archiving, the contents queued in the Active-Archive Bin are automatically archived. After a file is archived, it is marked Completed, and then removed from the Active-Archive Bin queue.

If you stop (disable) archiving, any queued files remain queued and are not archived until you start archiving again.

See Also

- *Starting and stopping automatic archiving*, on page 5-18

Examine or remove files queued for archiving

You can examine the queue status of selected files in your Active-Archive Bin to see if they have been archived correctly, are still waiting to be archived, or could not be archived because of errors.

You can examine the standard Windows properties of selected files in your Active-Archive Bin: file location, size, security information, and so on.

You can remove selected files from the archiving queue.

See Also

- *Examining the archiving status of a file*, on page 5-22
- *Removing a file from the Active-Archive Bin*, on page 5-23

Search for documents

From your Active-Archive Bin, you can search your repository (and any other repositories to which you have been given access). You can search either your Outlook email messages or the files you have archived using Document Manager.

See Also

- Chapter 2, *RISS Web Interface*
- *Searching for archived documents*, on page 5-29

Understanding the user interface

When you install Document Manager, the following user interface items are added to your Windows environment:

Table 5-1: Document Manager User Interface Objects

What	Where
My Active-Archive desktop icon and folder	Windows desktop. See *My Active-Archive desktop icon and folder*, on page 5-10.
My Active-Archive menu	Windows Explorer menu bar. See *My Active-Archive menu in Windows Explorer*, on page 5-11.
My Active-Archive tray icon[a]	Windows tray. See *My Active-Archive tray icon*, on page 5-11.
Help For My Active-Archive menu item, Help menu	Windows Explorer menu bar Help menu. See *Help for My Active-Archive*, on page 5-12.
My Active-Archive Properties dialog box	Various locations. See *My Active-Archive Properties dialog box*, on page 5-13.
Advanced Client Configuration Settings dialog box	Advanced button in the Import Status panel of the My Active-Archive Properties dialog box. See *Advanced Client Configuration Settings dialog box*, on page 5-15.

a. If the tray icon has been closed (using its Exit menu item), it will not be present in the tray. To restore it, see *Starting and stopping automatic archiving*, on page 5-18.

My Active-Archive desktop icon and folder

Your **Active-Archive Bin** is a special Windows folder, named My Active-Archive. The bin acts as a staging area for documents you queue for archiving. It functions much like your Windows Recycle Bin. When you drag and drop files and folders there, all dropped items are queued for archiving.

The My Active-Archive folder is located on your Windows desktop and in your Windows Desktop folder.

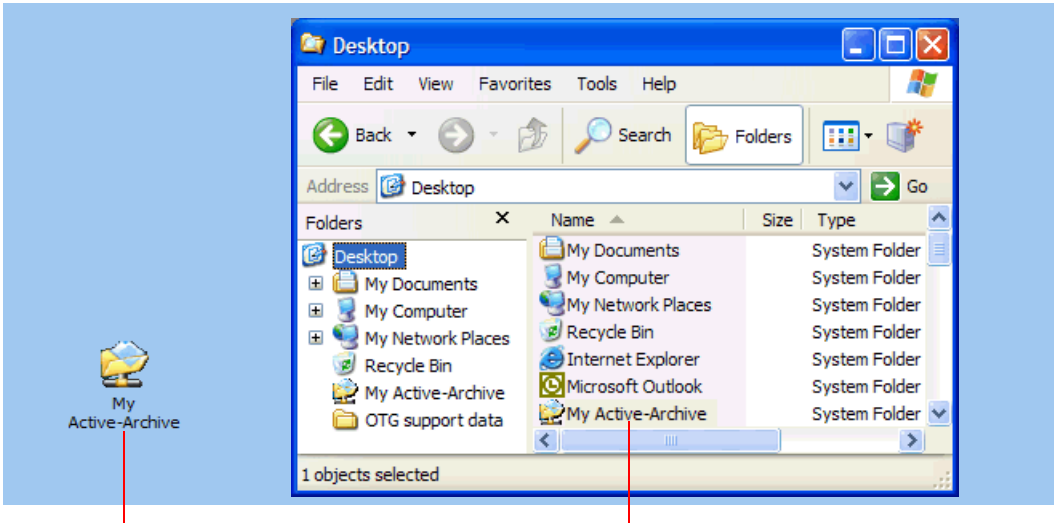


Figure 5-2: My Active-Archive desktop icon and folder

My Active-Archive menu in Windows Explorer

Whenever the My Active-Archive folder is open in Windows Explorer, the My Active-Archive menu is displayed the Explorer menu bar. Use this menu to search for documents or display the My Active-Archive Properties dialog box.

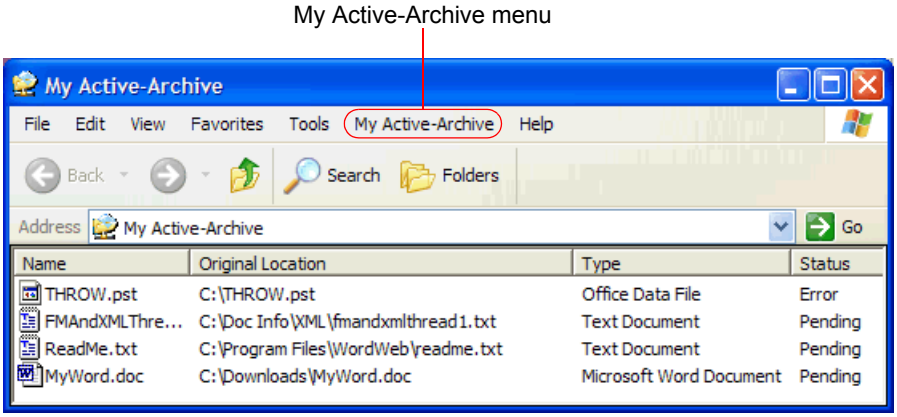


Figure 5-3: My Active-Archive menu, Windows Explorer

My Active-Archive tray icon

Right-click the My Active-Archive icon in the Windows tray to start and stop automatic archiving and to display the My Active-Archive Properties dialog box. By default, the Windows **tray** is to the right of the Windows task bar near the time display at the bottom of the desktop: 

.

Help for My Active-Archive

Whenever the My Active-Archive folder (your Active-Archive Bin) is open in Windows Explorer, the Help For My Active-Archive menu item is added to the Explorer menu bar Help menu. This menu item displays online help for Document Manager.

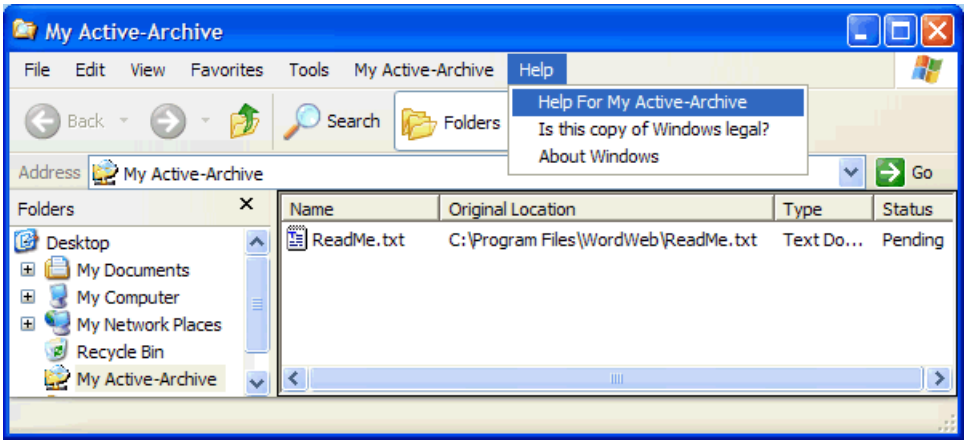


Figure 5-4: Help For My Active-Archive menu, Windows Explorer

Usage Note

- Another way to access the Document Manager online help is to right-click the My Active-Archive tray icon and choose Help.

My Active-Archive Properties dialog box

Use the My Active-Archive Properties dialog box to perform common tasks such as setting automatic archiving or generating reports, and to access system administrator features.

To display the My Active-Archive Properties dialog box, see *Displaying the archiving status and general settings*, on page 5-24.

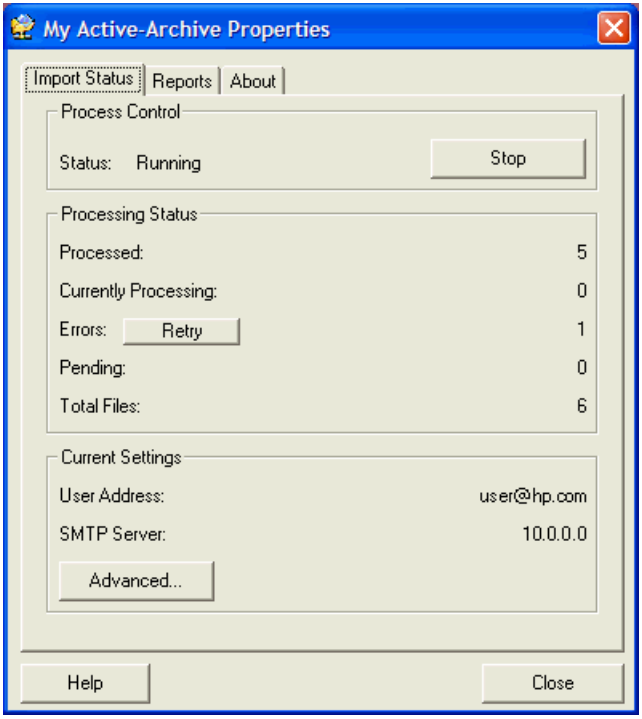


Figure 5-5: My Active-Archive Properties dialog box

The My Active-Archive Properties dialog box has the following tabbed panels:

Table 5-2: My Active-Archive Properties Dialog Box Panels

Panel	Description
Import Status	Displays configuration settings and archiving status. See *Displaying the archiving status and general settings*, on page 5-24.
Reports	Used to generate reports on the files you have queued for archiving since Document Manager was installed. See *Running reports*, on page 5-26.
About	Identification of the current Document Manager version. See *Identifying the installed Document Manager version*, on page 5-29.

Advanced Client Configuration Settings dialog box

Use the Advanced Client Configuration Settings dialog box to perform the system administrator tasks such as configure user settings, processes, and log files.

To display the Advanced Client Configuration Settings dialog box, see *Accessing advanced features*, on page 5-31.

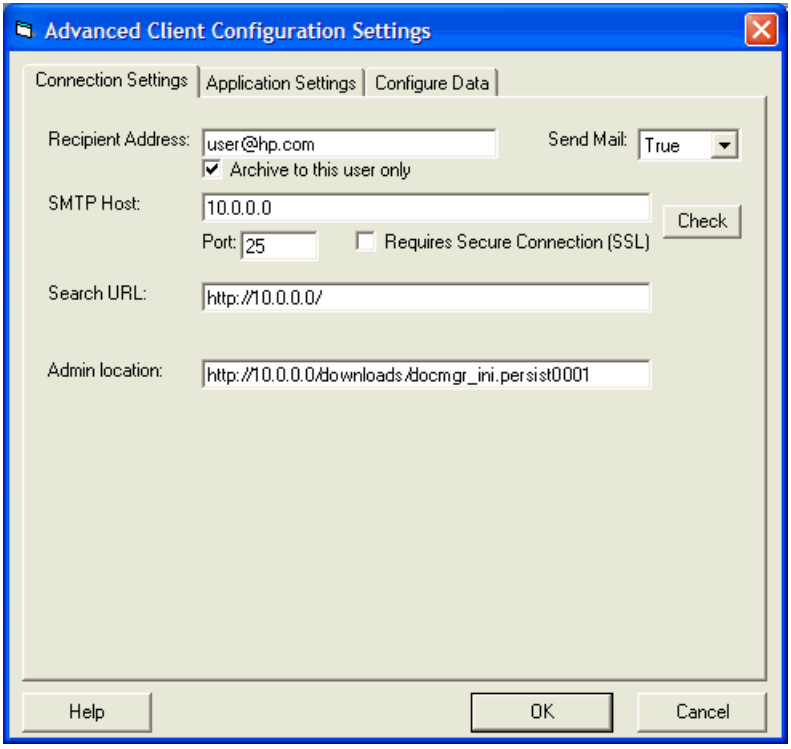


Figure 5-6: Advanced Client Configuration Settings dialog box

The Advanced Client Configuration Settings dialog box has the following tabbed panels:

Table 5-3: Advanced Client Configuration Settings Dialog Box Panels

Panel	Description
Connection Settings	Client–server connections used by Document Manager: the client user address and the server connection points. See *Configuring user settings*, on page 5-34 and *Configuring client-server connections*, on page 5-35.
Application Settings	Client processing and debugging options for logging, internal files, user warnings, and treatment of PST files. See *Enable or disable user warnings*, on page 5-37, *Configuring PST import and process settings*, on page 5-37, and *Modifying database entries*, on page 5-39.
Configure Data	Lets you perform operations on client database files. See *Modifying database entries*, on page 5-39 and *Compressing the database size*, on page 5-42.

Common tasks

Use the following table as a quick reference for performing common tasks.

Table 5-4: Document Manager Tasks

Task	Reference
Display the My Active-Archive icon in the Windows tray	*Starting the Active-Archive Monitor*, on page 5-18
Turn on/off automatic archiving	*Starting and stopping automatic archiving*, on page 5-18
Archive a file	*Archiving files*, on page 5-20
Turn on/off automatic archiving by default	*Setting the default archiving behavior*, on page 5-22
See which files are queued	*Displaying queued files*, on page 5-22
Check the status of a file queued for archiving	*Examining the archiving status of a file*, on page 5-22
Remove a file from the archiving queue (Active-Archive Bin)	*Removing a file from the Active-Archive Bin*, on page 5-23
Check Windows file properties of a file queued for archiving	*Examining properties of a file in the Active-Archive Bin*, on page 5-24
Check the configuration settings and processing history	*Displaying the archiving status and general settings*, on page 5-24
Run a report about the files you have queued	*Running reports*, on page 5-26
Determine which version of Document Manager you have installed	*Identifying the installed Document Manager version*, on page 5-29
Search for an archived document	*Searching for archived documents*, on page 5-29

Starting the Active-Archive Monitor

Active-Archive Monitor is another name for the My Active-Archive Windows tray icon: 

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To start Active-Archive Monitor:

- From the Start menu, choose Programs > Hewlett-Packard > HP RISS Document Manager > Active-Archive Monitor. The My Active-Archive icon is added to the Windows tray.

  If the Active-Archive Monitor was already started, the My Active-Archive Properties dialog box is displayed (see *My Active-Archive Properties dialog box*, on page 5-13). Dismiss it by clicking Close.

Note: If Document Manager is not in the Start menu, it might not be installed – see *Installing and uninstalling Document Manager*, on page 5-2. If it is installed, but the menu item is not present, see your system administrator for help restoring the menu.

See Also

- *My Active-Archive tray icon*, on page 5-11

Starting and stopping automatic archiving

Do one of the following to start or stop the automatic archiving of files you drop in your Active-Archive Bin:

- Use the Active-Archive Monitor:

  1. Make sure the Active-Archive Monitor is running – see *Starting the Active-Archive Monitor*, on page 5-18.
  2. Position your mouse over the My Active-Archive icon in the Windows tray: 

. A tooltip will be displayed, indicating the current status of automatic archiving, Running (archiving is on) or Stopped (archiving is off).
  3. To change the current status, right-click the My Active-Archive tray icon and choose Start Archiving or Stop Archiving, as appropriate.

- Use the My Active-Archive Properties dialog box:
  1. Display the My Active-Archive Properties dialog box – see *Displaying the archiving status and general settings*, on page 5-24.
  2. Click the Import Status tab to display the Import Status panel.
  3. Check the current Status (Stopped or Running) of automatic archiving (Process Control). To change the Status, click Start or Stop, as appropriate. The Status will change accordingly.

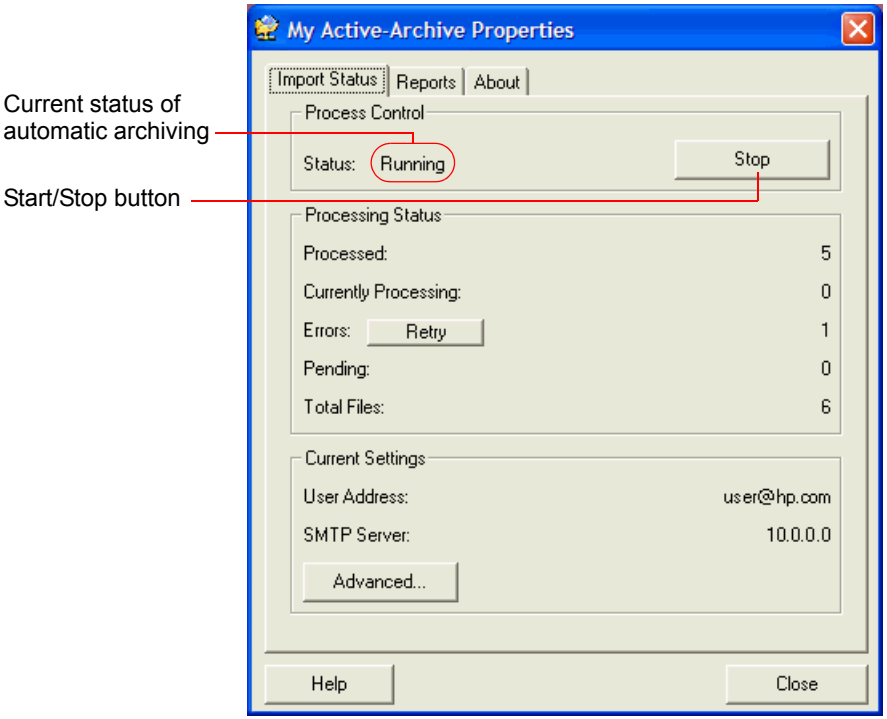


Figure 5-7: Changing automatic archiving status with the Import Status panel

See Also

- *My Active-Archive tray icon*, on page 5-11
- *My Active-Archive Properties dialog box*, on page 5-13

Archiving files

The following files can be queued for automatic archiving:

- Files contained in dropped folders
- Email messages contained in dropped PST files (Outlook Personal Folder files)
- Individual dropped files besides PST files

For more information, see *Files you can archive*, on page 5-5.

To archive a file:

1. Drag selected files and folders to the My Active-Archive folder (your Active-Archive Bin), and drop them there. (The folder need not be open.)
2. Make sure archiving is turned on – see *Starting and stopping automatic archiving*, on page 5-18.

   Files remain queued in your Active-Archive bin until you turn archiving on. After archiving is turned on, queued files are automatically processed for archiving.

Note: Archiving saves a copy of a file. The original file is not affected. However, do not delete a file you have queued for archiving, until you are sure that it has been successfully archived. See *Examining the archiving status of a file*, on page 5-22, for information on checking the status of a queued file.

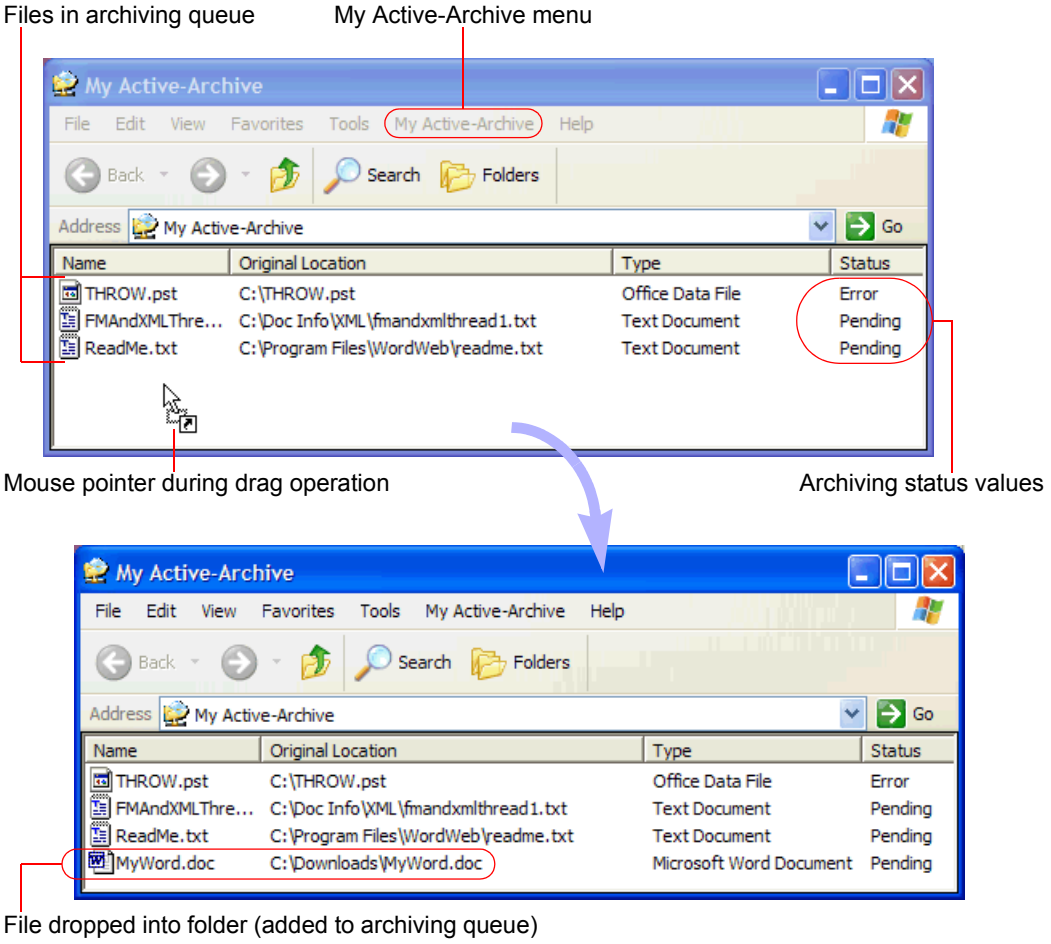


Figure 5-8: Dragging a file to your Active-Archive Bin (My Active-Archive)

See Also

- *My Active-Archive desktop icon and folder*, on page 5-10, for more information on the Active-Archive Bin.
- *Files you can archive*, on page 5-5, for restrictions on the files that can be archived.
- *Archive all email messages in a PST file*, on page 5-6, for information on archiving the email messages contained in a Personal Folder file.

Setting the default archiving behavior

After you turn automatic archiving on or off, the status (Running or Stopped) of the Active-Archive monitor remains the same until you change it. If you log off or restart your computer, the most recent status is saved as your preferred setting and restored when you log on again. Thus, turning archiving on or off sets the default behavior of automatic archiving.

Note: Many users prefer to leave archiving on at all times. If you choose to do this, be aware that automatic archiving can use a significant amount of your computer resources.

Displaying queued files

To display queued files:

- Open the My Active-Archive folder by double-clicking the folder icon on your desktop. The Active-Archive Bin is displayed.

Examining the archiving status of a file

To examine the archiving status:

- Open the My Active-Archive folder. The Active-Archive Bin displays the files. The archiving Status of a file is displayed next to the filename in your Active-Archive Bin.

  These are the possible Status values:

Table 5-5: File Archive Status Values

Status Value	Description
Pending	The file is queued to be archived. It has not yet been archived.
Processing	The file is currently being archived.

Table 5-5: File Archive Status Values (Continued)

Status Value	Description
Completed	The file has been archived. The file remains listed, with Completed status, until the Active-Archive Bin is refreshed. This is done automatically and usually takes only a few seconds for a given file. You can refresh the bin contents manually, if necessary, by closing and then reopening the bin in Windows Explorer. After the bin display is refreshed, files that were archived less than two minutes earlier are still listed with Completed status. Files that were archived more than two minutes earlier are no longer listed.
Error	An error occurred during an attempt to archive the file. When you see the Error status value, open the My Active-Archive Properties dialog box, panels Reports and Import Status – see *My Active-Archive Properties dialog box*, on page 5-13: 1. Examine the error report to determine the cause of the error. Choose Error Files, and then click Generate Report on the Reports panel. 2. Reset the status of all files with Error status to Pending status. Click Retry on the Import Status panel. Another attempt will be made to archive the error files. To remove a file with Error status from the bin, you must first Stop Archiving (see *Starting and stopping automatic archiving*, on page 5-18), Retry (to reset the Status to Pending), and then Remove the file – see *Removing a file from the Active-Archive Bin*, on page 5-23.

Removing a file from the Active-Archive Bin

Only a system administrator can remove a queued file with status other than Pending. You cannot drag a file out of the Active-Archive Bin.

Removing a file from the Active-Archive Bin, like queuing a file there, has no effect on the original file. Also, if someone previously archived the file, removing it from your archiving queue does not remove it from any repositories where it has been archived.

Do one of the following from the Active-Archive Bin to remove a queued file with the Pending status:

- Right-click the file and choose Remove.

- Select the file and press Delete.

Note: When you choose the Remove menu item or press Delete, you are not asked to confirm removal. If you change your mind after removing a file, add it to the archiving queue again.

Examining properties of a file in the Active-Archive Bin

To examine the Windows file properties of a file in your Active-Archive Bin:

- Right-click the file and choose Properties.

These are the same file properties you see by right-clicking a file elsewhere in Windows Explorer and choosing Properties. They include General information about the file location, size, attributes, and dates; Security information about access privileges; and Summary information such as the document Title, Subject, Author, and Comments. The Properties dialog box varies, depending on your Windows version and configuration. For more information, refer to the pertinent Windows documentation.

Displaying the archiving status and general settings

To display the archiving status and general settings:

1. Display the My Active-Archive Properties dialog box by choosing any of the following methods:
   - Click the My Active-Archive icon in the Windows tray.
   - Choose Properties in the shortcut menu of the My Active-Archive tray icon or folder icon.
   - Choose Properties in the My Active-Archive menu of Windows Explorer.
   - Choose Start > Programs > Hewlett-Packard > HP RISS Document Manager > Active-Archive Monitor, provided automatic archiving is turned on.
2. Click the Import Status tab.

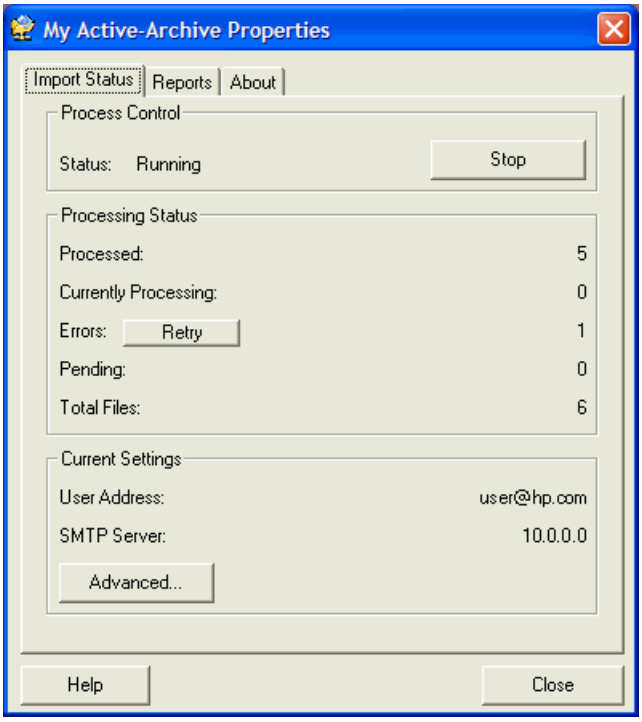


Figure 5-9: Import Status panel, My Active-Archive Properties dialog box

The Import Status panel of the My Active-Archive dialog box displays the following:

Table 5-6: **Import Status** Panel, My Active-Archive Properties Dialog Box

Item	Description
Process Control	• Status – Current status of archiving: Stopped or Running. Same as tooltip displayed with mouse over My Active-Archive tray icon. • Start or Stop button – Changes the current Status by starting or stopping automatic archiving (see *Starting and stopping automatic archiving*, on page 5-18). Same as Start Archiving or Stop Archiving in shortcut menu of My Active-Archive tray icon.

Table 5-6: **Import Status** Panel, My Active-Archive Properties Dialog Box

Item	Description
Processing Status	• Processed – Number of files processed since Document Manager was installed. Processed files were treated as candidates for archiving. They were not necessarily archived. • Currently Processing – Number of files currently being processed for archiving. • Errors – Number of files that could not be processed because of an error, ever since Document Manager was installed. Click Retry to reset the status of all files with Error status to Pending status (in the Active-Archive Bin file listing – see *Examining the archiving status of a file*, on page 5-22). Another attempt will then be made to archive the files. • Pending – Number of files currently waiting to be archived. • Total Files – Number of files you added to the archiving queue since Document Manager was installed.
Current Settings	• User Address – Your email address. Messages to and from this address are archived in your individual repository, as are all files you archive with Document Manager. • SMTP Server – The IP address or host name of the part of RISS that receives your documents (email messages and files) for archiving. • Advanced – After prompting for a password, clicking this displays the Advanced Client Configuration Settings dialog box, which is used by a system administrator to configure your Active-Archive Bin settings. See *System administrator tasks*, on page 5-30.

Running reports

You can generate reports on the files you have queued for archiving since Document Manager was installed.

To run a report:

1. Display the My Active-Archive Properties dialog box (see *Displaying the archiving status and general settings*, on page 5-24) and click the Reports tab.
2. Select one of the following reports:
   – Archived Files: Files that were successfully archived.

- Files Still in Queue: Files remaining to be archived.
- Error Files: Files that Document Manager has tried to archive, but has not been able to archive successfully because of internal errors.
- All Files: All files that you have queued for archiving.

3. Click Generate Report. The report is displayed in HTML format.

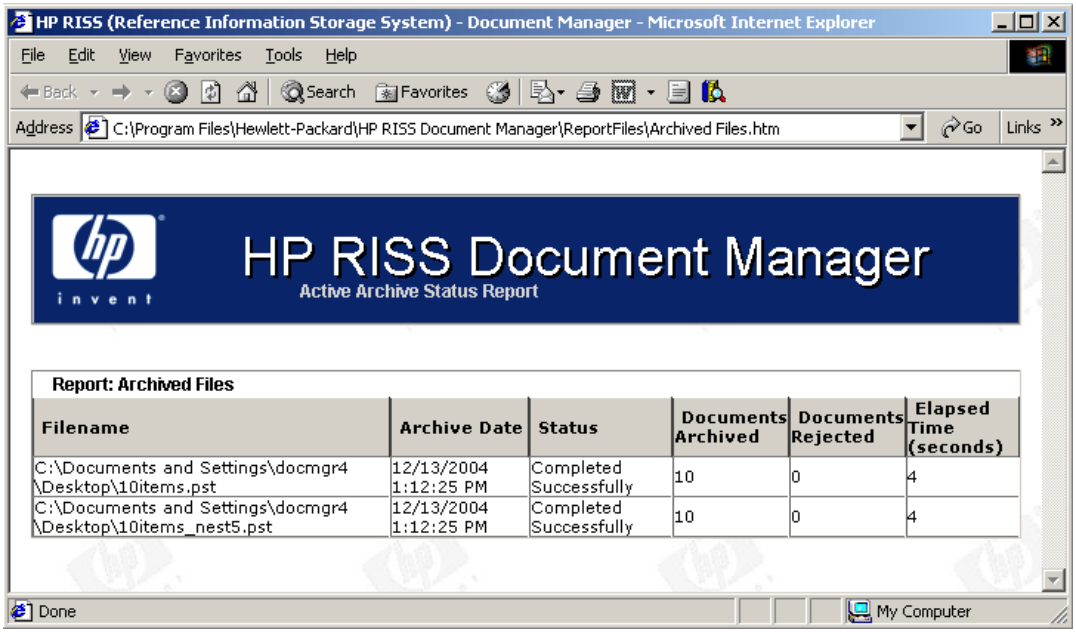


Figure 5-10: Generated report example

Each row in a report describes a file queued for archiving. Unless mentioned otherwise, a given column described in the table is common to all report types. A blank (empty) entry in any column means Document Manager has not yet tried to submit the file to the system for archiving, or was unable to properly access the file for processing.

Table 5-7: Document Manager Report Contents

Column	Description
Percent Complete	The percentage of documents contained in the PST file that were processed by Document Manager. All PST file component document types are included here: email messages, Outlook contacts, Outlook tasks, and so on. *Note:* Although this percentage refers to all documents in a PST file, only the Outlook email messages can be archived. Pertains mainly to PST files – see *Archive all email messages in a PST file*, on page 5-6. For a non-PST file this is either 0% (file not processed at all) or 100% (file completely processed).
Filename	Name of the file, including the complete path.
Last Modified	Date the file was last changed in some way. Not available for the Archived Files report.
Archive Date	Date the file was archived. Available only for the Archived Files report.
Status	Information about the status of processing the file for archiving. In case an error occurred, this can include the reason for the error. *Note:* If this field is blank (empty), the fields Documents Archived, Documents Rejected, and Elapsed Time (seconds) are not relevant.
Documents Archived	Number of email messages in the PST file that were successfully submitted to the system for archiving. Normally, this means these messages were all successfully archived by the system. Pertains mainly to PST files – see *Archive all email messages in a PST file*, on page 5-6. For a non-PST file this is either 0 (file not archived) or 1 (file archived). Relevant only if Status is not blank.
Documents Rejected	Number of email messages in the PST file that were not successfully submitted to the system for archiving. These messages were not archived. Pertains mainly to PST files – see *Archive all email messages in a PST file*, on page 5-6. For a non-PST file this is either 1 (file not archived) or 0 (file archived). Relevant only if Status is not blank.

Table 5-7: Document Manager Report Contents (Continued)

Column	Description
Elapsed Time (seconds)	Number of seconds Document Manager spent processing the file. Does not include time the file spent in the queue waiting to be processed. Relevant only if Status is not blank (empty).

Identifying the installed Document Manager version

To display the version of Document Manager you have installed:

- Display the My Active-Archive Properties dialog box (see *Displaying the archiving status and general settings,* on page 5-24) and click the About tab.

Searching for archived documents

You can use Document Manager to access the RISS Web Interface, where you can search for documents (email messages or files) in your repository.

To search for an archived document, choose one of the following methods:

- Right-click the My Active-Archive folder icon on your desktop or in Windows Explorer, and choose Search Archive.
- From the My Active-Archive menu of Windows Explorer, and choose Search.

System administrator tasks

Use the Advanced Client Configuration Settings dialog box to perform the following tasks:

Table 5-8: Advanced Client Configuration Settings Dialog Box Tasks

Task	Reference
Configure user settings	*Configuring user settings*, on page 5-34
Configure or check client–server connections	*Configuring client-server connections*, on page 5-35
Configure user warnings	*Enable or disable user warnings*, on page 5-37
Configure treatment of PST files and process settings	*Configuring PST import and process settings*, on page 5-37
Modify database entries	*Modifying database entries*, on page 5-39
Compact the database	*Compressing the database size*, on page 5-42

Document Manager clients and server

Document Manager generally refers to the client program running on an individual user machine. System administrators can configure the client program to suit the needs of the user and your system's configuration.

The client program communicates with the Document Manager server program running on the system. A system administrator configures the server program by using system-wide settings applicable to all client Document Manager programs served by the system. During client installation, the system-wide settings are used automatically to configure the client.

The following sections explain how to configure the Document Manager client program. Only a system administrator with appropriate access privileges can configure client program settings. For information on configuring the Document Manager server program, contact HP.

Accessing advanced features

To access all advanced features:

1. Display the My Active-Archive Properties dialog box – see *Displaying the archiving status and general settings*, on page 5-24.
2. Turn off archiving – see *Starting and stopping automatic archiving*, on page 5-18.
3. Click Advanced on the Import Status panel.

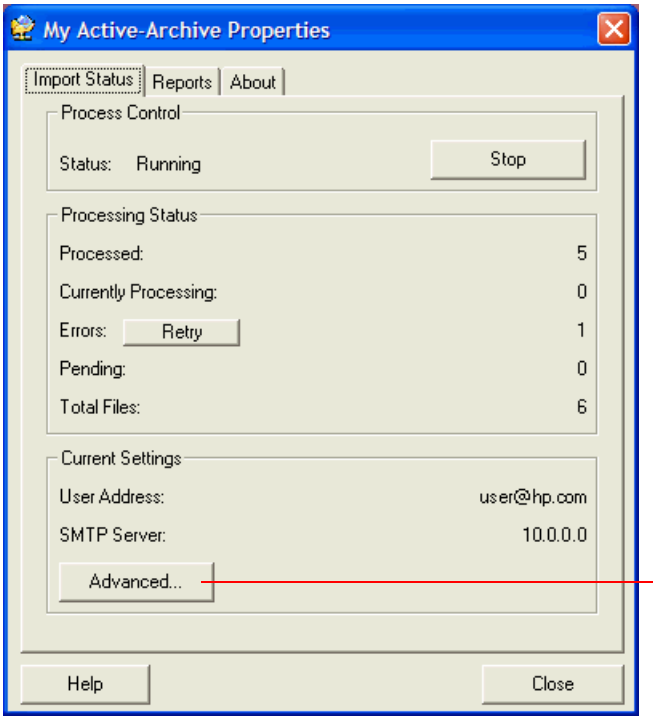


Figure 5-11: Advanced button, My Active-Archive Properties dialog box

4. Enter the administrator password and click OK. The Connections Settings panel of the Advanced Client Configuration Settings dialog box is displayed.

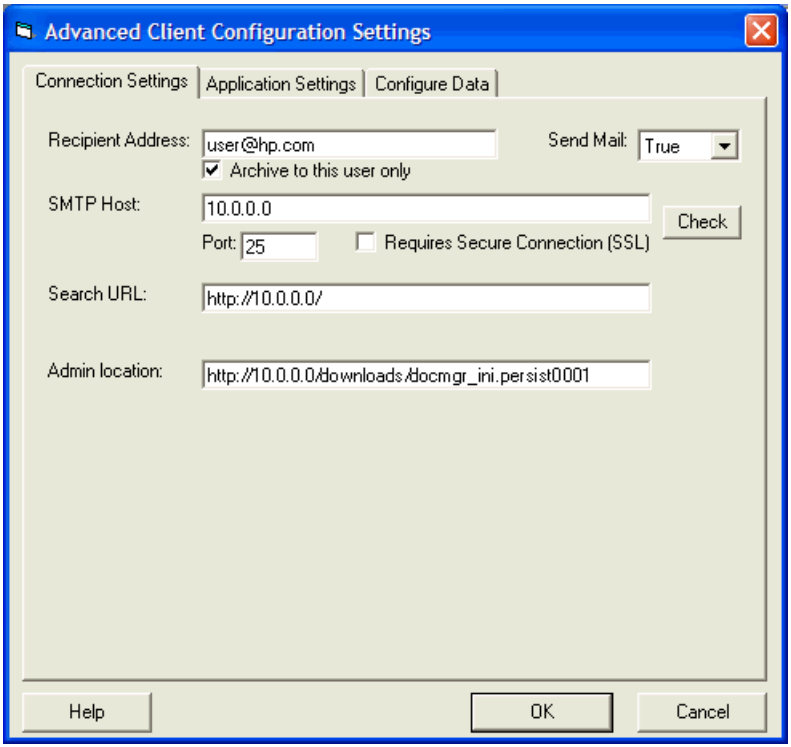


Figure 5-12: Connection Settings panel, Advanced Client Configuration Settings dialog box

5. To access user warning, PST import, or process settings, click the Application Settings tab – see *Enable or disable user warnings*, on page 5-37 and *Configuring PST import and process settings*, on page 5-37.

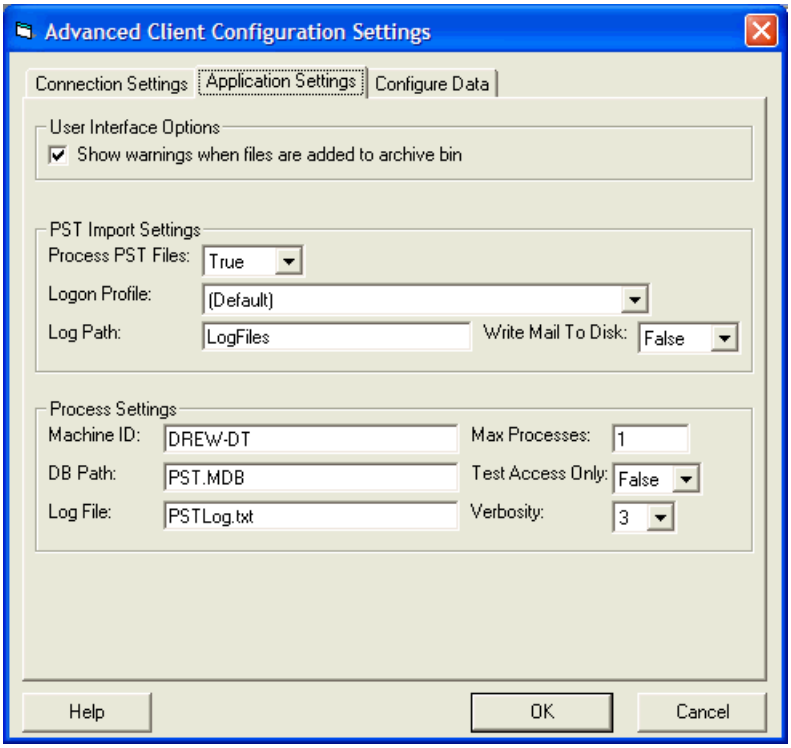


Figure 5-13: Application Settings panel, Advanced Client Configuration Settings dialog box

6. To access the client database settings, click the Configure Data tab – see *Modifying database entries*, on page 5-39 and *Compressing the database size*, on page 5-42.

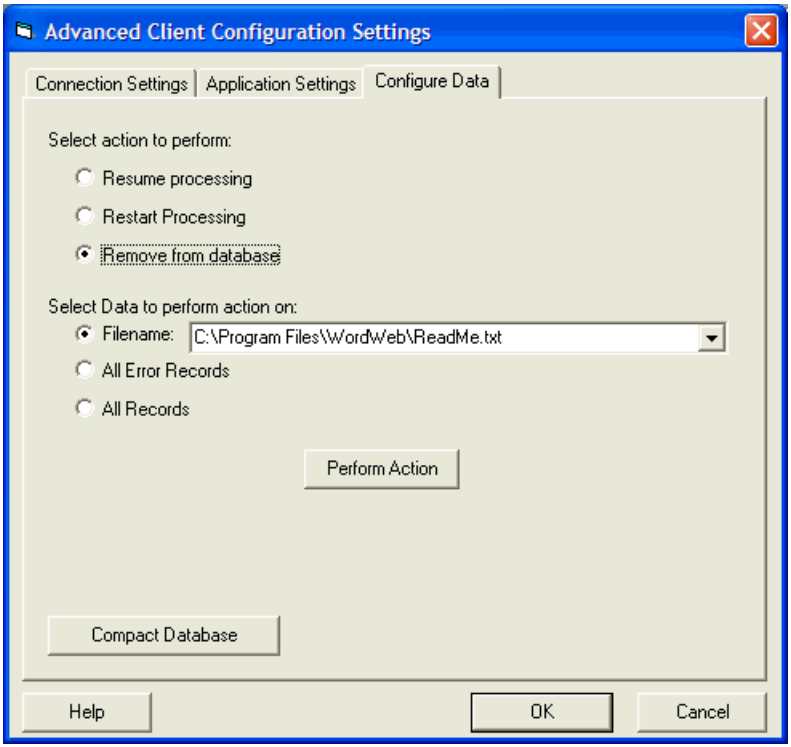


Figure 5-14: Configure Data panel, Advanced Client Configuration Settings dialog box

Configuring user settings

Use the Connection Settings panel of the Advanced Client Configuration Settings dialog box to configure basic user settings.

To configure user settings:

1. Display the Advanced Client Configuration Settings dialog box – see *Accessing advanced features*, on page 5-31.
2. Change the following settings if needed:

Item	Description
Recipient Address	Email address of the Document Manager client user. Messages to and from this address are archived in the corresponding user repository, as are all files the user archives with Document Manager.
Send Mail	If True (default), queued files (and the email messages contained in queued PST files) are sent to the system for archiving. If False, documents are not sent to the system. For normal client processing of queued files, use True. Use False only for testing the client. If, for example, errors are repeatedly reported when processing PST files, even when this is False, this suggests a client problem.
Archive to this user only	If enabled, routing rules are ignored. Archived files are routed only to the individual user repository. If disabled, any routing rules defined for your RISS are applied, archiving queued files in additional repositories as specified by the rules. Enable this for normal processing of queued files.

3. Click OK to apply changes and close the Advanced Client Configuration Settings dialog box.

Configuring client-server connections

Use the Connection Settings panel of the Advanced Client Configuration Settings dialog box to configure client–server connections used by Document Manager.

To configure client-server connections:

1. Display the Advanced Client Configuration Settings dialog box – see *Accessing advanced features*, on page 5-31.
2. Change the following settings if needed:

Item	Description
SMTP Host	The IP address or host name of the part of RISS that receives documents to be archived.
Port	The port to use for communicating with the SMTP Host.
Requires Secure Connection (SSL)	If enabled, client–server connections must use secure (SSL) ports. If disabled, ordinary ports can be used. *Important:* Do not enable this option unless you are sure that your version of RISS supports SSL connections. Otherwise, the server will not accept any files for archiving. All files will remain Pending in the Active-Archive Bin.
Check	Click to check the SMTP Host, Port, and Requires Secure Connection (SSL) settings by attempting to connect to the server (without sending any files for archiving). Use this to test the client–server connection.
Search URL	The RISS internet address.
Admin location	The internet address of the Document Manager client initialization file on the server. Whenever the client is launched, it retrieves this file and uses it to update client settings, which typically include: • Archive filter settings: types of files that can be archived, minimum file age, maximum size of a drag-and-drop operation • Server locations: SMTP Host, Search URL Leave the Admin location blank (empty) if you do not want the server to update the client at each client startup. This prevents the server from overwriting client settings.

3. Click OK to apply changes and close the Advanced Client Configuration Settings dialog box.

Enable or disable user warnings

Use the Application Settings panel of the Advanced Client Configuration Settings dialog box to enable or disable user warnings.

To configure user warnings:

1. Display the Advanced Client Configuration Settings dialog box – see *Accessing advanced features*, on page 5-31.
2. Click the Application Settings tab.
3. In the Show warnings when files are added to archive bin check box, change the following settings if needed:
   - Select the check box to enable this setting. If enabled, the user is warned whenever the client does not recognize a file as having contents that can be indexed. However, because the system actually archives and indexes documents sent to it by Document Manager, the warning is conditional ("might not be indexed").
   - Clear the check box to disable this setting. If disabled, the user is not warned about possibly non-indexable file contents.
4. Click OK to apply changes and close the Advanced Client Configuration Settings dialog box.

Configuring PST import and process settings

Use the Application Settings panel of the Advanced Client Configuration Settings dialog box to configure client processing and debugging options for logging, internal files, and treatment of PST files.

To configure PST import settings:

1. Display the Advanced Client Configuration Settings dialog box – see *Accessing advanced features*, on page 5-31.
2. Click the Application Settings tab.
3. Change the following settings if needed:

Item	Description
PST Import Settings	
Process PST Files	If True (default), the email messages contained in a queued PST file are archived (provided the client has Outlook 2000 or above). If False (or without Outlook 2000 or above), the queued PST file is itself archived, instead of the email messages it contains.
Logon Profile	The Outlook profile to use for the user when archiving email messages contained in a PST file. The (Default) choice means use the default Outlook profile. If the user is already logged on to Outlook when archiving is started, the profile used to log on is also used for archiving. Otherwise, the Logon Profile value is used for archiving.
Log Path	Folder where, for each PST file, a `.log` file is written to record processing status, provided Process PST Files is True. Each log file contains a header that names the corresponding PST file. If the path is relative, it is relative to the client Document Manager installation directory. The default value is the LogFiles folder in the Document Manager installation directory. If Process PST Files is False, Log Path is not used.
Write Mail To Disk	If True, a `.txt` file is written to the Log Path for each PST file. The file contains all of the email messages in the PST file. If False, no message file is written. For normal processing of queued PST files, use False. Use True for testing, when determining the cause of failed PST file processing. If Process PST Files is False, Write Mail To Disk is not used.
Process Settings	
Machine ID	Name of the desktop computer where the Document Manager client is located.
DB Path	Filename and path of the client database used to store information about files that have been queued for archiving and have not been removed from the archiving queue. If the path is relative, it is relative to the client Document Manager installation directory.

Item	Description
Log File	Filename and path of the client log file. This file records client activity, including processing of queued files, both PST and non-PST. (See Log Path for additional PST log files.) If the path is relative, it is relative to the client Document Manager installation directory. The default value is PSTLog.txt in the installation directory.
Max Processes	Maximum number of concurrent Windows processes used to process files queued for archiving. If this is 1 (default value), a single process is used. If this value *N* is different than 1, up to *N* queued files are processed in parallel, using separate connections to the server.
Test Access Only	For normal processing of queued files, use False (default). Use True only for testing the client. If False, queued PST files are processed normally according to the value of Process PST Files. If True, queued PST files are not processed for archiving. They are only checked for accessibility. You can see the result of this test in the Active-Archive Bin. A typical reason for PST inaccessibility is password protection during PST creation.
Verbosity	The amount of detail included in the Log File, as follows: • 1: alerts • 2: alerts and warnings • 3: alerts, warnings, and status messages • 4: alerts, warnings, and detailed status messages

4. Click OK to apply changes and close the Advanced Client Configuration Settings dialog box.

Modifying database entries

The Document Manager client has a local **database** that it uses to keep track of all files a user has ever queued for archiving (since client installation). This database is created when the client is installed.

The client database includes, for each file, a record of the archiving process and the current archiving status. All of the information presented in the Active-Archive Bin and the My Active-Archive Properties dialog box (Import Status and Reports panels) is contained in the database.

The Configure Data panel of the Advanced Client Configuration Settings dialog box lets you modify the database, removing selected file entries or resetting the status of selected files.

Note: Modifying entries in the client database has no effect on documents that have already been archived on the system. In particular, removing a document from the client database does not remove it from any repositories where it was archived.

To modify the database entries for one or more files:

1. Display the Advanced Client Configuration Settings dialog box – see *Accessing advanced features*, on page 5-31.
2. Click the Configure Data tab.
3. Choose an action to perform (Select action to perform):

Action to perform	Description
Resume processing	Resets the status of the selected files to Pending. Does not change the database history of what has already been processed so processing continues where it left off when archiving was last stopped. This ensures that multiple archiving (duplicates) of the same document does not occur. For example, if some messages contained in a PST file were successfully archived but others were not, the unsuccessful messages are reprocessed but the successful messages are not archived again. You typically use this to try again to process files with Error status. *Note:* The Retry button on the Import Status panel of the My Active-Archive Properties dialog box performs the Resume processing action on all files that have Error status.
Restart Processing	Resets records of the selected files so they will be processed again from scratch. Resets the status of the files to Pending, and then restarts the archiving process. *Note:* Because any record of previous processing of the selected files is erased, any files (or email messages contained in PST files) that have already been archived are re-archived, resulting in archived duplicates. You typically perform this action only if there has been a serious loss of data on the system and there is no risk of creating duplicates. Otherwise, use Resume processing instead.
Remove from database	Removes the selected files from the database. This does not remove the files from any repositories where they may have been archived. *Note:* Whereas removal of files using the Active-Archive Bin shortcut menu item Remove is restricted to files with Pending status, there is no such restriction here.

4. Choose which files to apply the action to (Select Data to perform action on):

Select Data to perform action on	Description
Filename	Choose a filename in the list to select it as the action target. The list contains the files referenced by All Records.
All Error Records	Selects all files with Error status as the action targets; that is, all files that were queued but were not successfully processed for archiving.
All Records	Selects all files referenced by the database as the action targets; that is, all files ever queued for archiving, except those that a user or administrator removed from the queue.

5. Click Perform Action.
6. Click OK to close the Advanced Client Configuration Settings dialog box.

Compressing the database size

Use the Configure Data panel to manually compact (compress) the client database. The database is compacted automatically each time you open Document Manager. For more information about the client database, see *Modifying database entries*, on page 5-39.

Note: You cannot compact the database while the Active-Archive Bin contents are open in Windows Explorer.

To compress the database:

1. Display the Advanced Client Configuration Settings dialog box – see *Accessing advanced features*, on page 5-31.
2. Click the Configure Data tab.
3. Click Compact Database.
4. Click OK to close the Advanced Client Configuration Settings dialog box.

Troubleshooting

Resuming after quitting improperly

This section contains information on what to do in case you were not able to quit Document Manager properly. This situation can arise if one or more of the following occurs:

- Your machine loses power
- Your machine restarts following an unexpected shutdown
- You quit Document Manager by clicking End Task in Windows Task Manager

When Document Manager restarts again, it reprocesses any documents that were being processed for archiving at the time of failure. This reprocessing ensures that these documents are archived, but it also implies the possibility that some documents will be archived twice. Duplicate archived documents present no problem, other than your seeing the same document returned twice in search results.

If Document Manager quit improperly and then restarted, check to ensure that automatic archiving is started or stopped as you intend (see *Starting and stopping automatic archiving*, on page 5-18). Failing to quit Document Manager properly can change the setting.

No further action is necessary unless both of the following are true:

- You added one or more PST files to the archiving queue.
- Document Manager is configured to archive the email messages contained in a queued Outlook Personal Folder (PST) file.

If both of these conditions are true, quitting Document Manager improperly can cause additional folders to be added to your Outlook folders list regardless of whether you had Outlook open at the time. Document Manager always uses Outlook (without visibly opening it) to process the email messages contained in PST files.

When Document Manager processes a PST file for archiving, the contents are temporarily opened as a new message folder in your list of Outlook folders. You name the corresponding Outlook folder when you create a PST file (the name is “Personal Folders” by default). For example, if you enter “Project” in

the Name field of the Create Microsoft Personal Folders dialog box when you create a PST file and you later queue this file for archiving, the folder Project is opened in Outlook when the PST file is processed by Document Manager.

Document Manager closes the temporary PST message folder after it processes all of the folder messages. However, if the application quits improperly, this closure may not take place. In that case, you can close the folder yourself, as follows:

1. Select the folder name in the Outlook folder list.
2. Right-click and choose Close <*folder_name*>.

Note: Closing an Outlook folder does not delete the associated PST file. You can reopen the PST file in an Outlook folder by using the Outlook menu File > Open (item Personal Folder File or Outlook Data File, depending on your version of Outlook). However, refrain from using an archived PST file as an Outlook folder. Otherwise, you may be tempted to archive the PST file again, which will create duplicate email messages in the archive.

CHAPTER 6

Query syntax and matching

This chapter specifies the syntax you use when you submit a query to retrieve archived documents (files or email messages) and how queries are matched against documents.

It contains the following topics:

- Query fields and expressions, on page 6-2
- Query expression syntax and matching, on page 6-3
- Query expression examples, on page 6-12

See Also

- Chapter 1, *RISS overview*, for fundamental concepts.

Query fields and expressions

The words **query** and **search** are used interchangeably in this guide. The act of querying consists of submitting a query. A query is a set of query **fields** that contain the search criteria you have entered. When you submit a query, the system matches the query against all documents of the type you specify (files or email messages) in the repository you are searching.

Different query fields represent different types of information. They correspond to different fields in a document. For example, when searching for email messages, the query field From corresponds to the message field From and represents the message sender. The available fields are different for email messages and files. For example, the From field is only available for message searches. The file Extension field is only available for file searches.

During querying, query fields are checked against the corresponding fields of archived documents to see if there is a match. For a document to **match** a query, its fields must match all of the corresponding query fields. For example, if the Subject field of an email message matches the Subject field of a query, but the From fields of the two do not match, the message and the query do not match.

Most query fields are text fields. A few, such as dates, are numerical. An empty query field, whether text or non-text, matches any document field. A non-text field is checked against archived documents using numerical comparisons appropriate to the field. For example, the date range of a message query is compared with the dates candidate messages were sent.

Fill text fields with query **expressions** that represent what you are searching. The expressions serve as patterns to be matched against corresponding fields of archived documents. The matching operation is the same for all text fields.

Query expression syntax and matching

Query expressions are composed of words

Query expressions can be as simple or as complex as needed. The essential idea behind document retrieval is that query words are compared with document words to find a match. You can also:

- Look for document words that are textually similar, but not necessarily identical, to query words – see *Matching similar words*, on page 6-7
- Look for word sequences in a document: words that are near each other, and in a particular order – see *Matching word sequences*, on page 6-8
- Combine query words using logical (Boolean) operators (AND, OR, NOT) – see *Boolean query expressions*, on page 6-9

Together, using these query constructs provide considerable power to find what you need.

The way a query expression is interpreted is similar to how documents are indexed when they are archived. The text is parsed (broken down) into words. The remaining characters are ignored, as separators. A query expression is fundamentally composed of words, no matter how complex it is.

For indexing and searching, a word need not belong to a natural language, such as English. For example, wt6_ht3 is a legitimate document word or query word. Some query words even contain wildcards, as in f??t.

Word characters

When the system examines a query expression to determine its words, some characters are not included in query words, but are treated as word separators. When a document is archived, indexing determines the document words, available for searching, in the same way.

Learning the rules of creating query words thus means learning also the rules of document indexing and therefore just what words you can search for.

Word characters and separators

Word characters include all uppercase and lowercase letters, digits, and the following additional characters:

- **_** (underscore)
- **#** (number/pound/hash sign)
- **&** (ampersand)

All other characters are **separators** (except, in queries, the wildcards ? and *, and the special query characters ~, “, -, and !).

However, the following rule also applies:

- &&, by itself, is not a word. It is a Boolean operator. When combined with at least one more word character, && can be part of a word. For example, a&&b is a word.

Query analysis and document indexing are not case-sensitive. Uppercase and lowercase letters are treated the same.

Regular expression definition of English word characters

Note: This section provides information intended only for users familiar with regular-expression notation.

The following regular expression provides, in succinct form, a complete specification of English word characters (except for the treatment of && as a non-word):

[A-Za-z0-9_#&]+

Letters and digits in different character sets

Letters and digits defined

All letters and digits are word characters. Just what the system considers a letter or a digit depends on the character set encoding used. For the US ASCII encoding, the letters are uppercase and lowercase English letters (**A–Za–Z**).

For the ISO 8859–1 (Latin–1) encoding, used for Western European languages, accented letters are included. Most ideographic characters, such as used in Asian languages, are also considered letters.

Whatever the language and encoding used for a particular document (file or email message), the system maps encoded characters to the Unicode 2.0 standard. The Unicode 2.0 standard is then used to determine if a given character is a letter or a digit (or neither):

- A **letter** is any Unicode character in one of these Unicode categories: Ll (lowercase letter), Lu (uppercase letter), Lt (titlecase letter), Lm (modifier letter), or Lo (other letter).
- A **digit** is any Unicode character whose Unicode name contains the word DIGIT, provided it is not in the range \u2000 (en quad = en space) through \u2FFF (ideographic description – future).

Letters and digits in files

Although all letters and digits are word characters, their treatment in files (including email message attachments) depends on the character encoding used. You can search for any words in email message bodies and headers, regardless of the encoding.

You can search for words in files (including email body, header, attachments, and indexed documents) provided the character encoding is one the following:

- ISO-LATIN-1
- ISO-8859-1
- US-ASCII
- UTF-8
- ISO-2022-JP
- BIG5
- ISO-8859-2
- koi8-r
- EUC-KR
- WINDOWS-1252
- WINDOWS-1253
- WINDOWS-1254
- WINDOWS-1255
- WINDOWS-1256
- gb2312
- WINDOWS-1258
- KS_C_5601-1987
- EUC-JP

- SHIFT_JIS
- GB18030
- EUC-TW
- ISO-8859-15
- Johab

This set covers western, central and eastern European languages, as well as Russian and Turkish. The great majority of text in Chinese, Japanese, and Korean is covered by these character sets as well.

Matching words

Matching of words is not case-sensitive: cat, Cat, cAt, and CAT all match each other. Corresponding uppercase and lowercase letters, such as A and a, are treated the same in all respects.

There are two kinds of query words: words that contain occurrences of one or both of the **wildcard** characters * and ?, and **literal words** that do not contain wildcards.

A literal word in a query expression matches the same word, character for character (case ignored), in an archived document. A word with wildcard characters (* or ?) matches a document word in the same way, character by character, except:

- **?** – matches any single character in a document word. For example, b??t matches beat, beet, boat, blot, best, bust, bout, and so on.
- ***** – matches any sequence of characters in a document word, including a sequence of no characters. For example, f*t matches the document words foot, feet, fit, fault, and ft; f* matches any document word beginning with f.

You can use any number of wildcard characters (* or ?) in a query word, but you cannot use a wildcard at the beginning of a query word. For example, *ion is not a valid query.

See Also

- *Query expression examples*, on page 6-12, for examples of query expressions with literal words and words with wildcards.

Matching similar words

Fuzzy words

You can search for document words that are textually similar to a given literal query word (that is, one that contains no wildcards) by appending a tilde (**~**) character to the word, creating a **fuzzy word**. For example, the fuzzy word define~ matches similar words such as defined and definite (but not defining, definition, indefinite, or pine). It will also match define itself.

How word similarity is measured

Note: This section provides an in-depth explanation of how word similarity is measured. In most cases, you do not need to be concerned with just how similar two words must be in order to match. However, when interpreting the results of complex queries, this information can help you better understand why you obtain the results you do.

The edit distance (also called Levenshtein distance) between two words is the number of single-character operations needed to change one into the other, where an operation is a deletion, replacement, or insertion.

For example, the edit distance between define and pine is three: two deletions (de) and one replacement (f by p). The distance between define and definite is also three (e replaced by i; te inserted).

So, why does the search engine consider define more similar to definite than to pine, even though the edit distances are the same (three)? Because the edit distance (number of character changes) is compared to the word length (of the shorter of the query and document words). Two words are closer, for purposes of querying, if it takes less to change one into the other, relative to their lengths.

The similarity ratio used by the search engine is d/min(query, doc), where d is the edit distance, min is a function that returns the lesser of its arguments, and query and doc are the lengths of the query word and document word, respectively. A fuzzy word **matches** a document word if this ratio is no more than 0.5.

Examples:

Words Compared	Similarity Ratio	Match?
define, definite	3/min(6, 8) = 3/6 = 0.5	yes
define, pine	3/min(6, 4) = 3/4 = 0.75	no (0.75 > 0.5)

See Also

- *Query expression examples*, on page 6-12, for examples of query expressions with fuzzy words.

Matching word sequences

You can use word sequences to find documents with words in a specified order that are separated a specified maximum distance.

Simple word sequences

To search for an ordered sequence of words, use a **simple word sequence**: a list of literal query words (no wildcards) separated by spaces (or other separators) and enclosed in double-quotes (**"**). A document **matches** a simple word sequence if all the words occur in the document in the same order, with no intervening words.

For example, the sequence “like a rolling stone” does not match a document with the text “like a large rolling stone” because of the intervening word “large.”

Proximity word sequences

Simple word sequences let you search for words that are separated by separators but not by other words. To search for document words that are in an ordered sequence, but that may be separated by other words, use a **proximity word sequence**.

To write a proximity word sequence, you use the same syntax as that of a simple word sequence, but you append a tilde (**~**) character to the second double-quote, and follow that with a proximity value numeral. The proximity value represents the maximum number of other document words that can occur between any two successive words of the sequence. A document

matches a proximity word sequence if all the words occur in the document in the same order, with at most N intervening words, where N is the proximity value.

For example, the sequence "bird garden stone"~3 will match any document that has these three words in this order, with bird and garden separated by no more than three words, and garden and stone separated likewise. It will match a document with the text "a *bird* in the rose *garden* is near a *stone*" because there are at most three words between successive sequence words. It will also match "a *bird garden* with a *stone*" for the same reason.

Simple word sequences are a special case of proximate word sequences: ". . ." = ". . ."~0. Note also that any documents found by ". . ."~N will also be found by ". . ."~M, whenever M > N.

See Also

- *Query expression examples*, on page 6-12, for examples of query expressions with word sequences.

Boolean query expressions

Boolean operator syntax

You can combine words, fuzzy words, and word sequences using the Boolean (logical) operators AND, OR, and NOT (these must be uppercase). The following table describes the Boolean operators, where each of *exp*, *exp1*, and *exp2* represents a word, fuzzy word, word sequence, or another Boolean query expression (nested in parentheses – see *Nested Boolean query expressions*, on page 6-11).

Table 6-1: Boolean Query Expressions

Syntax	Matches
NOT *exp* alternative syntax: **-** *exp* alternative syntax: **!** *exp*	all documents that do not match *exp*
exp1 **OR** *exp2*	all documents that match either *exp1* or *exp2*

Table 6-1: Boolean Query Expressions

Syntax	Matches
exp1 **AND** *exp2* alternative syntax: *exp1* **&&** *exp2* alternative syntax: *exp1 exp2*	all documents that match both *exp1* and *exp2*

Note: The second alternative syntax for AND indicates that AND is the default connective in query expressions. You do not need to supply AND explicitly. It is assumed if neither AND nor OR is used explicitly. For example, the query peace quiet is equivalent to the query peace AND quiet.

A NOT expression must be combined, using AND or OR, with another expression other than NOT (see *Nested Boolean query expressions*, on page 6-11). A query cannot consist solely of negative criteria.

NOT quiet	illegal
(NOT quiet) AND (NOT blue)	illegal
(NOT quiet) AND blue	legal
(NOT quiet) OR nois*	legal
(NOT quiet) OR "peace quiet"	legal

You must provide the proper number of arguments for a Boolean operator, or an error message will result: one argument for NOT (-, !), two arguments for each of AND (&&) and OR. For example, these queries will each result in an error message:

- alpha NOT – missing argument for NOT
- AND alpha – missing argument for AND

Boolean operators must be surrounded by one or more separators, typically whitespace. For example, the query peas&&carrots is not equivalent to the query peas && carrots; peas&&carrots is a single word (& is a word character).

The negation operators **-** and **!** are exceptions to this rule. They must each be preceded by a separator, but they need not be followed by a separator. For example, carrot-a6 is a single query word, but carrot -a6, like carrot (- a6), is equivalent to the Boolean expression carrot AND (NOT a6).

Nested Boolean query expressions

Boolean query expressions can be nested, by using Boolean expressions as arguments of Boolean expressions. To do this, you must enclose the nested expression in parentheses (**(**, **)**). For example, the following query searches for documents containing bird, but neither garden nor stone:

bird AND (NOT (garden OR stone))

You must provide the same number of opening as closing parentheses, and they must be properly nested, or an error message will result. For example, these queries will each result in an error message:

- bird AND (NOT (garden OR stone) – missing right parenthesis at the end
- bird AND) NOT (garden OR stone( ) – improperly nested parentheses

For clarity, always use parentheses for nested query expressions.

See Also

- *Query expression examples*, on page 6-12, for more examples of Boolean query expressions.

Query expression examples

Here are some examples of query expressions, with references to the pertinent syntax documentation.

Table 6-2: Query Expression Examples

Query Expression	Finds Documents With . . .	Reference(s)
peace OR quiet	Either peace or quiet, or both, in either order.	*Boolean query expressions*, on page 6-9
peace quiet peace AND quiet peace && quiet	Both peace and quiet, in either order.	*Boolean query expressions*, on page 6-9
peace&&quiet	The single word peace&&quiet.	*Boolean query expressions*, on page 6-9
peace or quiet	The three words peace, or, and quiet, in any order. or is a word. The OR operator must be uppercase.	*Boolean query expressions*, on page 6-9
not quiet	The words not and quiet. The NOT operator must be uppercase.	*Boolean query expressions*, on page 6-9
NOT quiet	Illegal. A query cannot be purely negative and must have some positive expression.	*Boolean query expressions*, on page 6-9
NOT NOT quiet	Illegal. Parentheses are needed: NOT (NOT quiet).	*Boolean query expressions*, on page 6-9
peace & quiet	The three words peace, &, and quiet, in any order. & is a word character. The AND operator is implied.	*Word characters*, on page 6-3 and *Boolean query expressions*, on page 6-9
peace | quiet	Both peace and quiet. | is a separator. The AND operator is implied.	*Word characters*, on page 6-3 and *Boolean query expressions*, on page 6-9

Table 6-2: Query Expression Examples (Continued)

Query Expression	Finds Documents With . . .	Reference(s)
peace AND (NOT quiet) peace && -quiet -quiet && peace	The word peace but not quiet.	*Boolean query expressions*, on page 6-9
peace AND quiet OR silence	Avoid using. Parentheses are needed: peace AND (quiet OR silence).	*Boolean query expressions*, on page 6-9
quiet OR silence AND peace	Avoid using. Parentheses are needed: quiet OR (silence AND peace).	*Boolean query expressions*, on page 6-9
pea*	Any word starting with pea such as: pea, peas, peace, or peach.	*Matching words*, on page 6-6
pea*c*	Words such as: peace, peach, or peaches.	*Matching words*, on page 6-6
"peace quiet"	Both peace and quiet, in that order, with no intervening words. Examples: peace quiet or peace $^%+{} quiet.	*Matching word sequences*, on page 6-8
"peace quiet"~1	Both peace and quiet, in that order, separated by at most one word. Examples: peace and quiet; peace, now;%^$ quiet; peace quiet; or peace george quiet.	*Matching word sequences*, on page 6-8
peace~	Words similar to peace such as: peaches, piece, place, or plate.	*Matching similar words*, on page 6-7
(peace quiet) AND (NOT "peace quiet")	Both peace and quiet, but not peace followed immediately by quiet. Examples: quiet peace; quiet blue peace; or peace, water, land, quiet.	*Matching word sequences*, on page 6-8 and *Boolean query expressions*, on page 6-9

INDEX

Symbols A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Symbols

&&
in Boolean query expressions 6-10
in words 6-4
* wildcard character, definition 6-6
- character in Boolean expressions 6-9
? wildcard character, definition 6-6
~ character
fuzzy words 6-7
proximity word sequences 6-8

A

About panel, My Active-Archive Properties dialog box 5-14
access control list (ACL), definition 1-3
ACL
See access control list
Active-Archive Bin, definition 5-10
Active-Archive Monitor, starting 5-18
adding files to the Active-Archive Bin 5-8
Advanced Client Configuration Settings dialog box 5-15
advanced features, Document Manager 5-31
alphabetic characters 6-4
AND query expressions 6-9
Application Settings panel, Advanced Client Configuration Settings dialog box 5-16, 5-33
approximate matching 6-7
Archive Options panel, Options dialog box 3-7
archived attachments 3-6
archived documents, searching from Document Manager 5-29
archived documents, searching from RISS Outlook Interface 3-5
archiving
definition 1-3
displaying status 5-22, 5-24
Document Manager 5-20
removing queued files 5-23
setting default behavior 5-22
starting and stopping 5-7
attachments proxy, definition 3-6
audit queries 2-13

B

Boolean query expressions 6-9

C

changing
RISS Web Interface password 2-19
user account settings in Outlook 3-7

character matching 6-6
character sets, supported 6-4
characters
  separator, definition 6-4
  wildcard, definition 6-6
  word 6-3
client-server connections, Document Manager 5-35
compressing database 5-42
Configure Data panel, Advanced Client Configuration Settings dialog box 5-16, 5-34
configuring
  client-server connections 5-35
  Document Manager user settings 5-34
  PST import and process settings 5-37
conjunctive queries 6-9
Connection Settings panel, Advanced Client Configuration Settings dialog box 5-16, 5-32
contents, indexing, definition 1-4
Content-Type indexing 1-5
control list, definition 1-3

D

database
  compressing 5-42
  Document Manager, definition 5-39
  modifying entries 5-39
default Boolean connective (AND) 6-10
definition
  * wildcard character 6-6
  ? wildcard character 6-6
  access control list (ACL) 1-3
  Active-Archive Bin 5-10
  archiving 1-3
  attachments proxy 3-6
  database, Document Manager 5-39
  digit 6-5
  document 1-3
  Document Manager 5-4
  field, query and document 6-2
  fuzzy word 6-7
  indexing documents 1-4
  letter 6-5
  literal query word 6-6
  matching
    Boolean query expression 6-9
    fuzzy word 6-7
    literal word 6-6
    proximity word sequence 6-9
    query 6-2
    simple word sequence 6-8
    wildcards 6-6
    word 6-6
  proximity word sequence 6-8
  query 6-2
  query expression 6-2
  repository 1-3
  RISS 1-2
  RISS Search Results folder 3-4
  routing rule 1-3
  rule, routing 1-3
  search 6-2
  separator character 6-4
  simple word sequence 6-8
  wildcard characters 6-6
  word character 6-4
deleting
  file queued for archiving 5-20
  query criteria 2-18
  query results 2-19
digit, definition 6-5
disabling, user warnings 5-37
disjunctive queries 6-9
displaying
  archived attachments 3-6
  archiving status 5-22, 5-24
  exported query results 3-5
  file properties 5-24
  general settings 5-24

installed Document Manager version 5-29
Message ID 2-8
query results 2-9
queued files 5-22
saved query criteria 2-17
saved query results 2-18
document archiving, explanation 1-3
document field, definition 6-2
Document Manager
accessing advanced features 5-31
archiving 5-20
compressing database 5-42
configuring
client-server connections 5-35
PST import and process settings 5-37
user settings 5-34
definition 5-4
description 1-2
displaying
archiving status 5-22, 5-24
file properties 5-24
general settings 5-24
installed version 5-29
queued files 5-22
enabling or disabling user warnings 5-37
installing 5-2
modifying database entries 5-39
removing queued files 5-23
requirements 5-2
running reports 5-26
searching archived documents 5-29
setting default archiving behavior 5-22
starting Active-Archive Monitor 5-18
starting and stopping automatic archiving 5-18
troubleshooting 5-43
uninstalling 5-3
document, definition 1-3
dragging files
from the Active-Archive Bin 5-23
to the Active-Archive Bin 5-20

E

edit distance between two words 6-7
email attachments
opening or saving in RISS Outlook Interface 3-6
empty query fields 6-2
enabling, user warnings 5-37
exported query results, displaying 3-5
exporting, query results 2-14
expression, query
definition 6-2
parsing 6-3

F

fields query and document 6-2
files
archiving with Document Manager 5-20
displaying properties 5-24
finding words
in order 6-8
near each other 6-8
similar 6-7
folder, RISS Search Results 3-4
fuzzy word, definition 6-7

I

implicit Boolean connective (AND) 6-10
Import Status panel, My Active-Archive Properties dialog box 5-14, 5-24
indexed documents
types 1-4
indexing documents 1-4

installing
Document Manager 5-2
RISS Lotus Notes Interface 4-2
RISS Outlook Interface 3-2

L

letter, definition 6-5
Levenshtein distance between two words 6-7
list, access control, definition 1-3
literal query word, definition 6-6
logging in and out, RISS Web Interface 2-2
logical query expressions 6-9

M

matching
definition
Boolean query expression 6-9
fuzzy word 6-7
literal word 6-6
proximity word sequence 6-9
query 6-2
simple word sequence 6-8
wildcards 6-6
word 6-6
similar words 6-7
Message ID, displaying 2-8
MIME Content-Type indexing 1-5
modifying, database entries 5-39
Multipurpose Internet Mail Extensions *See* MIME
My Active-Archive
desktop icon and folder 5-10
menu, Windows Explorer 5-11
Properties dialog box 5-13
tray icon 5-11

N

nearness between searched words 6-8
negative criteria 6-10
negative queries 6-9
nesting of Boolean query expressions 6-11
New Search button, RISS Web Interface 2-3
non-text fields 6-2
NOT query expressions 6-9
numerical query fields 6-2

O

opening, email attachments in RISS Outlook Interface 3-6
OR query expressions 6-9
Outlook Personal Folder file, definition 5-6

P

parentheses, for nesting Boolean query expressions 6-11
parsing query expressions 6-3
passwords, RISS Web Interface 2-19
Personal Folder file, definition 5-6
Preferences button, RISS Web Interface 2-3
Properties
menu item, queued file shortcut menu 5-24
proximity word sequence, definition 6-8
proxy, attachments, definition 3-6
PST file, definition 5-6
PST import and process settings, Document Manager 5-37

Q

query
  definition 6-2
query criteria
  deleting 2-18
  displaying saved criteria 2-17
  saving 2-12
query expression
  definition 6-2
  parsing 6-3
query field, definition 6-2
Query Manager button 2-3
query results
  displaying 2-9
  displaying saved results 2-18
  exporting 2-14
  saving 2-13
  sending 2-14
Query Results page 2-9
query results, deleting 2-19
queued files
  displaying 5-22
queuing files for archiving 5-8

R

Reference Information Manager
  See RIM
Reference Information Storage System
  See RISS
refreshing Active-Archive Bin
    display 5-23
Remove menu item, shortcut menu for
    queued file 5-23
removing, files from archiving
    queue 5-23
Reports panel, My Active-Archive Properties dialog box 5-14
reports, Document Manager 5-26
repository, definition 1-3
requirements
  Document Manager 5-2
  RISS Lotus Notes Interface 4-2
  RISS Outlook Interface 3-2
  RISS Web Interface 2-2
retrieving a large number of
    documents 2-13
RIM, application programs for users 1-2
RISS
  applications 1-2
  definition 1-2
RISS Lotus Notes Interface
  description 1-2
  installing 4-2
  requirements 4-2
  searching archived email
      messages 4-4
  setting up 4-2
RISS Outlook Interface
  changing user settings 3-7
  description 1-2
  displaying
    archived attachments 3-6
    exported query results 3-5
  installing 3-2
  requirements 3-2
  searching archived documents 3-5
  setting up 3-2
  stub or tombstone 3-3
  troubleshooting 3-9
RISS Search Results folder,
    definition 3-4
RISS Web Interface
  advanced searching 2-6
  description 1-2
  passwords 2-19
  Query Results page 2-9
  requirements 2-2
  searching 2-5
  toolbar 2-3
routing rule, definition 1-3
rule, routing, definition 1-3
running Document Manager

reports 5-26

S

saving
email attachments in RISS Outlook Interface 3-6
query criteria 2-12
query results 2-13
Search Archive button, RISS Outlook Interface 3-3
Search for field, RISS Web Interface 2-3
search, definition 6-2
searching
RISS Lotus Notes Interface 4-4
RISS Web Interface 2-5, 2-6
sending, query results 2-14
separator character, definition 6-4
setting up
RISS Lotus Notes Interface 4-2
RISS Outlook Interface 3-2
setting, default archiving behavior 5-22
similarity between two words 6-7
simple word sequence, definition 6-8
starting
Active-Archive Monitor 5-18
archiving 5-7
automatic archiving 5-18
stopping
archiving 5-7
automatic archiving 5-18
stub icon 3-3

T

text fields 6-2
tilde character
fuzzy words 6-7
proximity word sequences 6-8
tombstone icon 3-3
toolbar, RISS Web Interface 2-3
troubleshooting
Document Manager 5-43
RISS Outlook Interface 3-9

U

uninstalling, Document Manager 5-3
user settings
Document Manager 5-34
RISS Outlook Interface 3-7
user warnings, Document Manager 5-37

W

wildcard characters, definition 6-6
Windows tray, definition 5-11
word character, definition 6-4
word characters 6-3
word matching 6-6
word sequences 6-8